

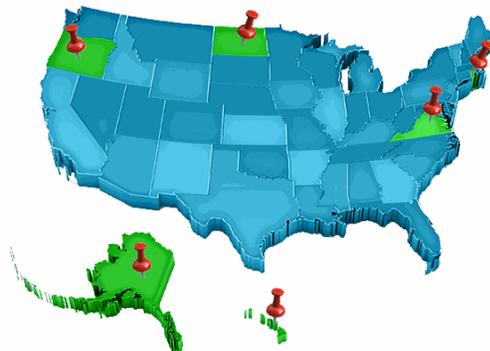
Solicitation N^o: 170007304

Due Date: Thursday, March 23, 2017, 3:00 p.m. AST

Submit To: Alaska Division of General Services



Transcription Services
for the
State of Alaska
and
Participating States



Executive Summary and Technical Response

Submitted By

Legal Name: Bureau of Office Services, Inc.

Address: 11S270 S Jackson Street, Suite 106
Burr Ridge, Illinois 60527-6818

FEIN: 36 239 1254 DUNS: 06 861 8834 CAGE: 1XQ50

Point of Contact

Contact Name: Richard E. Piasecki, President/CEO

Signature:

Phone: 800.5.BUREAU [528-7328]; 630.323-2600

Fax: 630.323-6666

E-Mail: RichP@BureauHQ.com



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Executive Summary

The Bureau of Office Services, Inc. (“Bureau”) is a 59-year-old corporation that has provided transcription and document processing services since its inception. Our enterprise-scale systems for digital audio capture, toll-free telephone recording, streaming media processing, secure FTP and web transfer, centralized template transcription and automated quality assurance are utilized daily by thousands public and private sector users nation-wide. The Bureau has the experience and staff to provide mixed media capture, transcription, quality assurance review and secure delivery services on a continuous, 24/7/365 basis. This includes ongoing administration, work management and real-time Bureau system access for client administrators. The Bureau will provide all of these capabilities directly using only Bureau-owned staff, facilities and equipment.

Because we perform all aspects of our service, we offer direct personal service. That means, we come to important meetings, we train your staff and we support you throughout the project. Items which distinguish the Bureau from our competition is our:

➤ History of Stability

- Operation as a transcription provider since 1958
- Successful execution of federal, state, county and local contracts involving secure capture and distribution of classified material
- U.S. corporation with traditional corporate policies for leveraging production compliance and direct systemic production control
- Technology-driven with the latest industry procedures, standards and systems



➤ Experienced Staff

- 100% U.S.-based production staff
- Production staff that average 16 years' experience
- Separate Quality Assurance (QA) department
- Ongoing, successful 24/7/365 implementations managing law enforcement dictation and document routing projects
- Singularly accountable Bureau project manager and point-of-contact—Ms. Christine Weisbrodt
- In-house Information Systems (IS/IT) department and help desk
- Separate Data Entry/Interface (DEI) department for planning, developing and managing both simple and sophisticated data integration projects
- Relevant experience with systems, security and technical requirements



➤ Corporate Policies, Reputation and Standards

- Yearly staff contracts that include a/an:
 - Ethics clause
 - Data usage, privacy and security agreement
 - Safe and secure internet usage and communications policy
- Provision and security of all equipment and work-related materials
 - Use of only Bureau-owned, managed and secured systems
 - Updated hard copy and electronic professional reference material



➤ Certifications, Corporate Security and Training

- Federal training and certification for all project staff for:
 - Information Security



- Privacy and protected information
- Federal ANACI security clearance for administrative, production and technical staff
- **Reliable Systems**
 - On-site, secure data center with modern networks, strict security and robust telecommunication services (i.e., no reliance on hosted or “cloud” service providers)
 - Triple-redundant enterprise broadband internet connectivity with speeds of 50 Mbps, 12 Mbps and 6 Mbps
 - Customer-accessible, encrypted internet sites *located on-premises at the Bureau* to ensure strict chain-of-custody of all recordings and documents
 - Secure, multi-terabyte media, document and data storage capacity which allows for years of retention (if deemed valuable):
 - Media retention and on-demand customer review for 1 year or more
 - Customer document retention, retrieval and printing for 1 year or more
 - Meticulous logging of all incoming and outgoing data access and use events
 - Automatic software, data entry screen and template document updates for production staff which ensure instant adherence to format changes
 - Updated anti-virus and anti-malware filtering and real-time protection
 - Encrypted storage for workstations and servers
 - PKI-based e-mail with asymmetric, public key encryption
 - Decades of experience processing and implementing transcription projects involving digital media technology, nation-wide access, and data integration
- **Billing and Tracking**
 - Automated, hands-off billing at the server level
 - Immediate tracking of each recording and their linked document(s) in real time
 - Automatic, detailed logging of data access and use events including media transfer, processing, transcription, QA, document view, export and delivery for easily verifiable auditing
 - Encrypted internet access to administrative data, documents, detail and summary reporting, access history and other relevant data for authorized customer staff



Technical Response

Experience and Capabilities (4.5.1)

A. Offeror Profile

1. Corporate Particulars (Offeror Profile a., b. & c.)

Corporate Particulars	
Full Legal Name:	Bureau of Office Services, Inc.
Chicago HQ:	Bureau of Office Services, Inc. 11S270 S Jackson Street, Suite 106 Burr Ridge, IL 60527-6818
Phoenix Satellite:	Bureau of Office Services, Inc. 9932 E. Peregrine Place Scottsdale, AZ 85262-1476
Ownership Structure:	For-Profit Corporation
Toll-Free:	(800) 5-BUREAU [528-7328]
Established:	January 13, 1958
Services Provided:	Secure Digital Media and Streaming Capture, Toll-Free Multi-User Dictation, Forms Automation, Centralized Templating, Transcription, Translation, Quality Assurance, Secure Document Delivery, HL7 Interfaces, Secure Internet Reporting, Secure Customer FTP and Web Retrieval, Remote Customer On-Site Printing, Remote Customer Administrative Management
EIN / TIN:	36-2391254
CAGE:	1XQ50



2. Key Personnel (Offeror Profile d.)

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Christine M. Weisbrodt

Professional Skill and Task Summary

<ul style="list-style-type: none"> ◆ Configure, supervise and schedule 24/7/365 workload queues, routes and production staff ◆ Coordinate and review ongoing Quality Assurance (QA) sampling metrics ◆ Manage and monitor workflow for the secure electronic delivery of tens of thousands of quality-checked medical documents per month ◆ Day-to-day customer liaison 	<ul style="list-style-type: none"> ◆ Perform initial planning, configuration and ongoing changes of customer media capture, prioritization, QA and delivery systems ◆ Generate, process and audit ongoing customer billing and employee payroll data ◆ Create and maintain detailed instructions for customer and supervised employees ◆ Plan and execute internal and external meetings
---	--

Systems Experience

<p>SOFTWARE EXPERTISE</p> <ul style="list-style-type: none"> ◆ Word® ◆ Excel® ◆ Outlook®, Outlook Express® ◆ Corel® WordPerfect® ◆ Corel® PaintShop Pro® ◆ Procomm® ◆ Crescendo® ◆ Dictaphone® 	<ul style="list-style-type: none"> ◆ Cisco® ◆ Windows® ◆ Acrobat® ◆ Citrix® ◆ Firefox™ and Seamonkey™ ◆ Chrome™ ◆ Thunderbird™ ◆ ZIP / archiving 	<p>EXPERIENCE/MASTERY</p> <ul style="list-style-type: none"> ◆ Business and user-centric internet technologies <ul style="list-style-type: none"> ▪ Browsing ▪ E-mail ▪ Encryption ▪ Social Networking ▪ Multimedia ▪ File Transfer ▪ Security ▪ VPN ◆ CIS/HIS/RIS and other Healthcare Systems <ul style="list-style-type: none"> ▪ Cerner ▪ CPSI ▪ Meditech ▪ QSI ▪ VistA ▪ HIPAA ◆ Electronic File Hierarchy/Organization ◆ High-volume Document Processing (format, compress, encrypt, print, mail, batch)
---	--	---

Employment History

<p>1998-Present</p>	<p>Bureau of Office Services, Burr Ridge, Illinois</p> <p>1998 Assistant Account Manger</p> <p>1999 Account Manager and Trainer</p> <p>2000 Light Medical Department Manager</p> <p>2006 Heavy Medical Department Manager</p> <ul style="list-style-type: none"> ◆ Directly manage over 50 production, QA and interface staff ◆ Day-to-day client contact with customer administrators, physicians and executives ◆ Responsible for accurate accounting within my department (orders, billing, payroll, job costing, aging, issue diagnosis, resolution and follow-up) ◆ Responsible for planning, setup and ongoing support of clients ◆ Responsible for ensuring the accurate processing of over 6000 documents per day ◆ Responsible for documenting, ensuring accuracy and coordinating additions and changes related to customer clinical, hospital and departmental information systems ◆ Responsible for text integration, template development, critical production, quality assurance, security and privacy of critical data 	<p>(630) 323-2600</p>
<p>1997-2004</p>	<p>Preferred Title, Glen Ellyn, Illinois</p> <p>Clerical Administrator (weekends)</p> <ul style="list-style-type: none"> ◆ Efficiently and accurately generate detailed title commitments and policies ◆ Data entry, research, file organization and final processing 	<p>(630) 627-8050</p>
<p>1990-1997</p>	<p>Ace Hardware/Elegant Solutions, Chicago Heights, Illinois</p> <p>1990 Cashier</p> <p>1993 Tool Department Manager</p> <p>1995 Patio and Outdoor Area Manager</p>	<p>(708) 755-0880</p>

Education

<p>Prairie State College, Chicago Heights, Illinois</p>	<p>1993 Computer Science</p>
<p>Bloom Township High School, Chicago Heights, Illinois</p>	<p>1992 Diploma</p>

Figure 1, Account Manager, Christine Weisbrodt



KATHY ADAME

401 Glendale Drive
 Schaumburg, Illinois 60196
 Tel: (630) 494-1122 • Fax: (630) 494-1128
 kathyadame@usbs.com

Professional Skill and Task Summary

- ♦ ~150 wpm (unassisted)
- ♦ ~195 wpm (assisted)
- ♦ Expert-Level Medical Transcriptionist and Quality Assurance (QA) Editor
- ♦ E-Mail Communication
- ♦ Planning, Organizing and Maintaining Detailed Instructional Worksets for Customer-Specific Needs and Directives

Software Expertise

- ♦ Word®
- ♦ Excel®
- ♦ Firefox™ and Seamonkey™
- ♦ WordPerfect®
- ♦ Outlook Express®
- ♦ Crescendo®
- ♦ Windows®
- ♦ Procomm®
- ♦ Dictaphone®

Employment History

- 1992-Present **Bureau of Office Services, Burr Ridge, Illinois** (630) 323-2600
 - 1992 Medical Transcriptionist II
 - 1997 Medical Transcriptionist III
 - 2000 Quality Assurance Editor
 - 2001 Quality Assurance Editor II
 - 2003 Quality Assurance Supervisor
 - ♦ Heavy production of medical reports for English-speaking and ESL healthcare providers
 - ♦ Quality Assurance (QA) queue monitoring, editing, mark-up and scoring
 - ♦ QA-related communication to production staff
- 1988-1992 **Medical Records Transcription & Coding, Dallas, Texas** [DEFUNCT]
 - 1988 Medical Transcriptionist
 - ♦ Production transcription of medical reports
- 1978-1988 **Fast and Accurate Transcription Service, Schaumburg, Illinois** [DEFUNCT]
 - 1978 Medical Transcriptionist
 - 1983 Lead Medical Transcriptionist
 - ♦ Production transcription of medical reports
 - ♦ Work processing, editing and printing and delivery

Education

- Lutheran General School of Nursing, Park Ridge, Illinois** Nursing 1976
- Harper College, Schaumburg, Illinois** Associate in Science 1978

APRIL 2013

Figure 2, QA Department Manager, Kathy Adame

LIZABETH ROWLEY

PROFESSIONAL ASSETS AND EXPERIENCE

★ Expert Multi-Specialty Medical Language Skill	★ Mastery of English and ESL Transcription	★ Quality Assurance Review, Scoring and Feedback
★ Microsoft® Word	★ Microsoft® Excel	★ InstantText™ Speed Typing
★ Crescendo MedRite-XL®	★ HIPAA Privacy Training	★ Direct End-User Training

PROFESSIONAL HISTORY

■ Bureau of Office Services	11s270 S Jackson Street, N ^o 106 Burr Ridge, Illinois 60527-6818 630.323.2600	1997 - Present
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Role: **Quality Assurance Supervisor** responsible for ensuring timely and accurate delivery by efficiently reviewing and editing medical reports in a statistical document management framework

- Responsibilities:
- ☆ Prepare, organize and maintain customer-specific end-user documentation
 - ☆ Plan, create, test and maintain system data validation screens and templates
 - ☆ Manage QA document work queue
 - ☆ Review, verify, edit and mark-up QA sampled and routed documents
 - ☆ Document errors, format variations and technical events
 - ☆ Score documents for abstracting production staff performance
 - ☆ Communicate and elicit feedback from production staff

Role: **Medical Transcriptionist III** responsible for high-volume transcription using automated media, templating and document routing platform

- Responsibilities:
- ☆ High-volume transcription of English speaking and ESL dictators
 - ☆ Production of documents within a structured and templating workflow system
 - ☆ Create, collect, organize and maintain documentation

Role: **Transcription Tester and Trainer** responsible for interactively evaluating and educating prospective and new staff

- Responsibilities:
- ☆ Score new prospective employee tests and communicate results to management
 - ☆ Prepare training materials and interactively train new employees

■ EDiX (now Spheris; fmr. Health Information Associates, MRT&C)	140 Fountain Parkway St. Petersburg, Florida 727.572.5655	1989 - 1997
--	---	-------------

Role: **Medical Transcriptionist II** responsible for high-volume transcription of "basic four," all acute-care specialties and clinical documentation

- Responsibilities:
- ☆ High-volume transcription of English speaking and ESL dictators
 - ☆ Create, collect, organize and maintain documentation

■ FACTS	Schaumburg, Illinois	1988 - 1989
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Role: **Medical Transcriptionist** responsible for transcription of "basic four," all acute-care specialties and clinical documentation

- Responsibilities:
- ☆ High-volume transcription of English speaking and ESL dictators
 - ☆ Create, collect, organize and maintain documentation

EDUCATION

■ DePaul University	Chicago, Illinois
■ James B. Conant High School	Schaumburg, Illinois

REFERENCES

Maurice O'Connell Manager, CDW G Proposal Team CDW Corporation 847.521.3476	Julie Latham SPT Tools, Inc. 847.612.3204	Kathy McGuinn SPT Co-Owner Sunrise Tree Services 847.561.7247
--	---	--

Figure 3, QA Department Supervisor, Liz Rowley



426 Ridge Meadow Court
 Burr Ridge, IL 60526-4814
 fred_nehls@burr.com
 (630) 254-4700
 (630) 254-8813

EXPERIENCE AND SKILLS

- ★ Network Design
- ★ Web Technologies
- ★ System Administration
- ★ Infrastructure
- ★ Speech Processing
- ★ Document Workflow
- ★ Database Administration
- ★ Technical Support
- ★ Project Management
- ★ Software Development
- ★ Technical Writing
- ★ Technical Sales
- ★ Speech Capture
- ★ Auth. and Encryption
- ★ Training
- ★ Real-Time Interfaces

EMPLOYMENT HISTORY

Bureau of Office Services, Burr Ridge, Illinois 11/1993 - Present
 IT Director 7/1995 - Present
 IT Systems Manager 5/1994 - 7/1995
 IT Systems Specialist 11/1993 - 5/1994

Duties

Plan, coordinate, develop, document, install, configure and test all technical infrastructure. Develop internal and customer software. Ensure reliability and redundancy. Installation and ongoing management of all networks, peripherals and systems deployed at customer locations. Attend trade shows, give presentations, perform demonstrations, develop technical marketing material and white papers.

Deployed Products and Technologies

CAT5/CAT6 cabling and termination; electrical, generator and UPS infrastructure; data center/racking infrastructure; local and remote server and workstations; PKI authentication and encryption; Linux, Macintosh and Windows systems; network infrastructure including Cisco, Endian, Juniper, Nortel and OpenVPN network appliances and software; speech and media capture and processing systems (microphone, portables, telephone, video and wireless); document management, delivery and templating systems; production FTP, FTPS, HTTP, HTTPS, SFTP servers; accounting and CRM systems.

Midwest Crescendo, Burr Ridge, Illinois 4/2006 - Present
 Speech Systems Manager

Duties

Sell, deploy and support enterprise media and document processing systems. Customer and vendor liaison. Plan, coordinate, develop, document, install, configure and test all administrative components, media processing (i.e., dictation, audio/video recording) components and document management components for platforms at customer locations. Ensure customer requirements and ongoing needs are met.

Deployed Products and Technologies

Crescendo, Dictaphone, Grundig, Nuance, Olympus and Philips audio, document and video management platforms. Plan, configure, install and test all components and complete platforms including servers, peripherals, cabling, electrical infrastructure. Perform all ongoing maintenance and upgrades remotely. Write and coordinate ongoing maintenance agreements with customer administrative and technical staff.

Harrah's Casino, Joliet, Illinois 5/1993 - 11/1993
 Network Specialist

Duties

Software development of administrative accounting and tracking systems. Project management of network and system deployments, upgrades and ongoing maintenance. Software and hardware troubleshooting and support. Identify, classify and track all assignments and issues.



EMPLOYMENT HISTORY [continued]

<i>Bellcore (Bell Communications Research/Bell Labs),</i> Lisle, Illinois System Specialist Duties Hardware, network and software installation, maintenance and support. Develop documentation, presentations and training solutions.	8/1992 - 5/1993
<i>UOP (Universal Oil Products),</i> Des Plaines, Illinois PC and Network Analyst Duties Software and hardware installation, maintenance and support.	5/1992 - 8/1992
<i>CTI Logistics,</i> Aurora, Illinois Programmer, Network and Systems Administrator Duties Internal and customer application software and database planning, development, deployment, documentation, maintenance and support. Network and systems hardware software installation, training and support. Network planning, installation, testing, deployment and ongoing maintenance. Internal systems and server installation and ongoing maintenance.	11/1991 - 5/1992
<i>Chicago Board of Trade,</i> Chicago, Illinois PC Specialist Duties Internal and customer application software and database planning, development, deployment, documentation, maintenance an support. Network and systems hardware software installation, training and support. Network planning, installation, testing, deployment and ongoing maintenance. Internal systems and server installation and ongoing maintenance.	5/1990 - 11/1991

ACCOMPLISHMENTS AND EDUCATION

<i>Western Illinois University,</i> Macomb, Illinois Bachelor of Science, Computer Science	8/1988 - 5/1990
<i>College of DuPage,</i> Glen Ellyn, Illinois Associate in Science, Data Processing	1/1986 - 6/1988
<i>Eagle Scout,</i> Boy Scouts of America	6/1982
<i>Explorer Scout,</i> Boy Scouts of America	9/1981 - 6/1983
Argonne National Labs, Argonne, Illinois Applied Low Temperature Physics Lab	8/1982 - 6/1983
High Voltage Electron Microscope Lab	9/1981 - 6/1982

Figure 4, IT Director, Fred Nehls

The majority of key staff are production employees. The Bureau requires a minimum of five (5) years of production transcription experience. Bureau’s production personnel have an average of over sixteen (16) years’ experience—one of the highest in the industry. Retention of quality production employees is a primary focus and is regularly drilled into Bureau managers.

The Bureau records and tracks production staff assignments and skills. (Figure 5) Data taken from the Bureau skill tracking database shows the pool of transcription staff that are familiar with the variety of general and specialty formats that are currently performing work on a daily basis.

Bureau Production Staff										
Transcription Staff Name	Years Exp.	Work Expertise								
		Available On-site	Commercial / General	Law Enforcement	Probate Legal	Legal			Medical	Military
						Family Legal	Civil Legal	Criminal Legal		
A., Kathy, QA Supervisor	30	●	●	●	●	●	●	●	●	●
A., Melissa	8		●	●			●	●	●	
A., Judy	20	●	●	●					●	
A., Judi	36		●						●	
A., Jeanne	14	●	●	●					●	●
B., Sandy	14	●	●	●					●	
B., Linda	12		●	●	●	●	●	●	●	●
B., Linda	25		●	●	●	●	●	●	●	●
C., Tammie	12	●	●	●		●		●	●	
C., Sue	11		●	●					●	
C., Tanya	10		●	●					●	
D., Jayme	13		●							
D., Debbie	16		●	●					●	●
D., Jennifer	11		●	●					●	
F., Kathleen	15		●	●					●	
F., Diane	9		●	●	●	●	●	●	●	●
F., Sandy	26	●	●	●	●	●	●	●	●	●
G., Tracie	11		●	●	●	●	●	●		●
G., Jessica	14		●	●					●	
G., Barbara	41	●	●	●					●	
G., Kay	12		●	●					●	●
H., Julie	16		●	●	●	●	●	●	●	●
H., Susan	11		●	●				●	●	
K., Kathleen	16		●							
K., Janene	14		●	●	●	●	●	●	●	●
L., Beverly	19		●							
L., Margaret, QA Editor	23	●	●	●					●	
L., Joy	9		●							

L., Janet	13	●	●	●						●	●
M., Patricia	21		●	●						●	●
M., Jennifer	9		●								
N., Jennifer	19	●	●	●						●	
O., Daryl Lynn	15	●	●	●						●	●
O., Judi	9		●	●						●	●
P., Michelle	15		●	●			●	●			
P., Lori	17		●	●							
R., Gayle	20		●	●						●	
R., Maureen	11		●	●						●	
R., Carole	29	●	●	●						●	
R., Linda	15		●	●	●	●	●	●	●	●	●
R., Cynthia	17	●	●	●						●	
R., Lizbeth, QA Editor	21	●	●	●	●	●	●	●	●	●	●
S., Corrine, QA Editor	21	●	●	●	●	●	●	●	●	●	●
S., Rose	23	●	●	●						●	
S., Karla	7		●	●	●	●	●	●			
S., Ruth	5		●	●	●		●	●	●		
S., Greta	9		●	●			●	●	●		
S., Vickie	7		●	●			●	●	●		
S., Pat	22	●	●	●	●	●	●	●	●	●	●
T., Gema	6		●	●							
T., Sara	19		●	●	●	●	●	●	●	●	●
W., Pat	41	●	●	●	●	●	●	●	●	●	●
W., Crystal	13	●	●	●						●	
W., Linda	20	●	●	●						●	
Y., Stephanie	9		●	●	●	●	●	●	●	●	●

Mean Years Experience: 16.38

Figure 5, Bureau transcriptionist skills summary report. †Call for available locations.

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3. Employee Size (Offeror Profile e.)

The Bureau currently employs 61 individuals.

4. Website (Offeror Profile f.)

The Bureau maintains a single marketing website at: <https://www.bureauhq.com>

In addition, the Bureau owns and maintains several secure production sites for customer administration, production customer data transfer and automated data collection and distribution. All production sites are hosted on-site at the Bureau, thus ensuring end-to-end security without middlemen or third-party providers.

5. Sales Contact Information (Offeror Profile g.)

Sales inquiries should be directed to:

Bureau Sales Contacts					
Contractual Matters:	Richard E. Piasecki	President/CEO		(630) 323-2600 x.209	
				(630) 235-6700 Cell/SMS	RichP@BureauHQ.com
Technical Sales:	Michael Weisbrodt	Sr. Account Manager		(630) 323-2600 x.212	
				(630) 235-6702 Cell/SMS	MichaelW@BureauHQ.com

6. Client Retention Rate (Offeror Profile h.)

Over the last three years, the Bureau has averaged 76 customers. The average retention rate over three years is 81%. This is calculated by subtracting the previous year’s client count by the number of client departures then dividing by the total number of clients for the previous year and multiplied by 100% as follows:

$$([\text{CLIENT COUNT}_{PY}] - [\text{CLIENT DEPARTURES}_{CY}] \div [\text{CLIENT COUNT}_{PY}]) \times 100\% = [\text{RETENTION RATE PERCENT}]$$

Departures are defined as clients from the previous year who did not submit work for the current year. Be aware that roughly ¼ of Bureau customers are sporadic, only providing production volumes every two, three or sometimes more years. Therefore, client departures and client acquires more often reflect the infrequent nature of low-volume, long-term customers.

Bureau Client Retention					
Year	Client Total	Percent Change	Client Departures	Client Acquires	Retention
2014	75	-2.6%	14	12	80%
2015	73	-2.7%	15	14	78%
2016	80	+9.6%	16	23	85%

7. Brief Company History (Offeror Profile i.)

The Bureau has provided dictation recording, transcription, production editing and document processing services since 1958. We started with wire and tape recording equipment and typewriters, moved production to the first Burroughs and IBM word processors in the early 1970’s, converted to the first digital dictation servers and modem delivery in the late 1980’s, implemented fully electronic, real-time web services in the 1990’s and currently operate a 100% self-hosted, database-centric environment today. Our current platform provides full multi-tenant media and document lifecycle support. That involves—from beginning to end—toll-free telephone recording, real-time streaming media processing, portable dictation import, smart phone apps, transcoded media capture, automated prioritization, self-loading template transcription, speech recognition, automated quality assurance and fully automated delivery protocols such as HL7, DICOM, XML, JSON and others.

Services currently offered include:

- Computer, smart phone app, digital portable and telephone recording capture
- Secure customer FTP and web transfer
- Bar coding, customized prompting and submission forms
- General, law enforcement, legal, medical and technical transcription
- Foreign language translation
- Editing and statistical quality assurance

- Electronic signature
- Secure, automated document delivery

8. Company Growth (Offeror Profile j.)

Recent company growth has primarily been in the law enforcement, legal and military fields. The bulk of sales remains, as it has for decades, clinical and hospital medical transcription.

Departmental workloads are stable. Variably alternating single digit declines and single digit growth percentages have been the norm for commercial, insurance, medical and technical departments in recent years. However, ongoing government contracts have seen double-digit increases for the past decade. The Bureau’s highest growth numbers have been with Federal, State, County and Local governments—especially for child and family services, disability (light medical), law enforcement and legal transcription.

9. States Serviced (Offeror Profile k.)

As a nation-wide service provider, the Bureau offers all requested services and all service options to all States connected to and participating this NASPO ValuePoint procurement.

List of Participating States			
State	Service Option	Service Type	Service Option
Alaska (Lead State)	YES	General Transcription	YES
		Court/Legal Transcription	YES
		Medical Transcription	YES
Virginia	YES	General Transcription	YES
		Court/Legal Transcription	YES
		Medical Transcription	YES
North Dakota	YES	General Transcription	YES
		Court/Legal Transcription	YES
		Medical Transcription	YES
Hawaii	YES	General Transcription	YES
		Court/Legal Transcription	YES
		Medical Transcription	YES
Rhode Island	YES	General Transcription	YES
		Court/Legal Transcription	YES
		Medical Transcription	YES
Oregon	YES	General Transcription	YES
		Court/Legal Transcription	YES
		Medical Transcription	YES

B. Customer Service

1. Hours of Operation (Customer Service a.)

The Bureau operates 24/7/365. Production staff work all hours in overlapping shifts. Customer support hours also around-the-clock. Managerial staff maintain both day and night availability which includes business cell phone call and SMS availability.

All instructional material including posters, cards and detailed instructions include the Bureau's help desk phone number and e-mail address. Recording and dictation instruction wallet cards also include your manager's name, business cell phone number and two emergency backup numbers.

2. Problem Identification (Customer Service b.)

Problems and solutions at the Bureau are classified into two categories and tracked by two (2) separate systems—the Bureau's production database tracking system and the Bureau's issue tracking system.

Problems may be identified by either the customer or Bureau staff. Regardless of the source, problems are tracked the same way. Normally, all issues which are called in via telephone receive an immediate response by Bureau employees. The Bureau does not outsource any portion of customer support.

Items relating to production are tracked in the Bureau's production database and stored and linked with each recording job and transcript. This links problems to either a specific job, a group of jobs, an end user and/or a document. These are tracked and viewable 24/7/365 by the customer in the Bureau's management platform by approved customer staff.

Technical and administrative issues that are not tied to specific recording jobs or transcripts are tracked in the Bureau's issue tracking system. Each is issued a ticket and is automatically assigned to the responsible supervisor or manager (production issues), supervisor or executive (escalated issues) or to the next available technical support staff (technical issues). Notification alerts, time-based priority elevation and regular monitoring ensure no issue is missed by staff.

Target resolution turnaround for normal and high priority issues is 1 hour, however, most items are handled immediately in less than an 1 hour—current average is 18 minutes for 2017 and was 27 minutes for 2016.

3. Systems to Manage Multiple Accounts (Customer Service c.)

The Bureau's centralized recording, transcoding, routing, transcription, quality assurance and document delivery platform is a database-controlled platform. Each job is segregated at several levels, by customer, by customer category, by author or submitting user, etc. The first segregation level, *by customer*, is the most important. When a job is imported, that categorization ensures that all processes and configuration options are applied from that level on down through the entire multi-step process, from: A) prioritization, B) queue routing, C) transcriptionist assignment, D) data entry screen selection, E) template assignment, F) quality assurance evaluation and scoring parameters, G) document export format and H) delivery method and I) receipt verification.

The Bureau is responsible for the entire process from end-to-end.

4. Response to Customer Complaints (Customer Service d.)

Normally, Bureau policy dictates that formal complaints are addressed in writing to the affected and interested parties. This ensures that a clear trail of evidence and understanding is communicated between the parties involved. Responses to complaints will always involve Bureau managerial, supervisory and/or executive staff.

One-time or sporadic issues (e.g., regional phone outage) that occur without a pattern are normally directed to the customer's account manager at the Bureau or the Bureau help desk for tracking and follow-up. Whether a customer initiates communication to the Bureau help desk staff, to the Bureau's account manager or directly to Bureau supervisory or executive staff, issues are tracked in the Bureau's issue management system.

5. Assessment of Customer Satisfaction (Customer Service e.)

The Bureau evaluates customer performance metrics both reactively and proactively. Evaluation done at year's end is done reactively and is done by both narrative evaluation and statistical analysis. This is done with narratives collected by account managers and supervisors along with statistical production data and issue tracking data. Proactive service evaluation is done every week during departmental *team alignment meetings*. Action is taken and/or customer input is sought for deficiencies. This is tracked using the Bureau's issue tracking system.

6. Quality Assurance (Customer Service f.)

The role of the Quality Assurance Department (QA) at the Bureau serves three functions:

- Assuring final transcription product quality using verified statistical methods within a unified processing, tracking, review and reporting system
- Initial and ongoing production staff training, education and feedback
- Ongoing customer author/provider deficiency tracking and reporting

DocID	Status	Facility ID	Dept ID	Report ID	Author ID	Author Name	Subject ID	Subject Name	Tran ID	Tran En
11205277	U	135	4	2	1111	Provider, Test	111223333	Patient, Test	661004	12/14/2
11205379	U	135	4	2	1111	Provider, Test	111223333	Patient, Test	661004	12/14/2

Figure 6, The QC screen shows reports queued to QA staff for correction, edit and scoring. After QA processes these jobs, they are reviewed by the original transcriptionists and scoring information is available to Bureau and customer administrators.

Quality Assurance is one of the most important and advanced components of the Bureau's technical platform. All transcription may be either automatically routed or manually selected for QA review. Automatic routing is based on several functional quality review sampling rates set by Bureau administrative staff. In addition, any document with a *blank* (i.e., unclear speech, dropout, heavy static, etc.) is automatically routed to QA for review. Transcription and administrative staff can also manually route a report to QA with additional non-billable and tracked comments that are stored with the final report in the transcription database.

When QA staff log in, work is queued automatically based on facility, department, report type, TAT and priority. (Figure 6) Reports are triggered and routed to QA by:

1. Random sampling
2. Customizable percentage (0% to 100%) by:
 - a. Facility (Figure 7)
 - b. Department or other organizational subdivision (Figure 8)

- c. Author or recording technician (Figure 9)
 - d. Work type (Figure 10)
 - e. Transcriptionist (Figure 11)
3. The number of blanks—the default is one (1) blank to automatically route to QA
 4. Manually by transcriptionist
 5. Manually by managerial or executive staff

This flexibility allows for problem audio formats and authors to be assigned a 100% QA level. It also allows transcriptionists that are assigned to a new account to have 100% of their work routed to QA for timely feedback until they become familiar with the content. Minimum random sampling rates for all transcriptionists is five (5%) percent. Sampling rates are adjusted as necessary and can be adjusted based on error rates and upon customer request.

Once a transcribed document is queued and selected for review by a QA editor, the initial transcription entry screen is displayed. This is the same data entry screen that transcriptionists use to initially process a report.

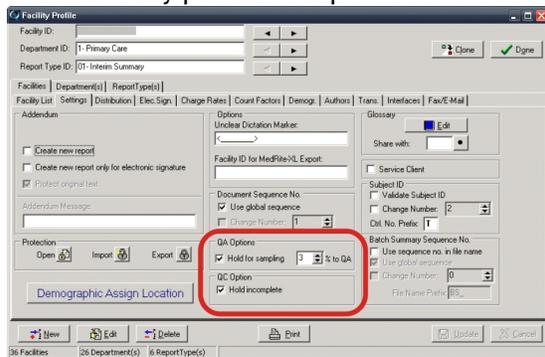


Figure 7, QA Percentage configured at the Facility or customer level.

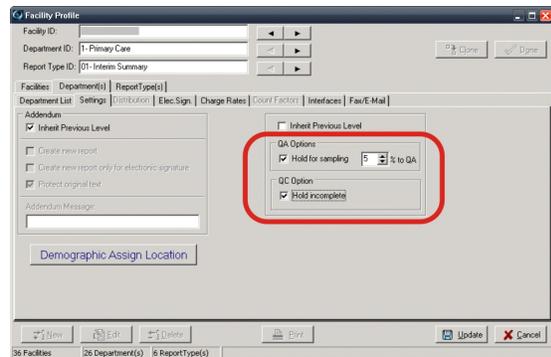


Figure 8, QA Percentage configured for each Division or Department within your organization.

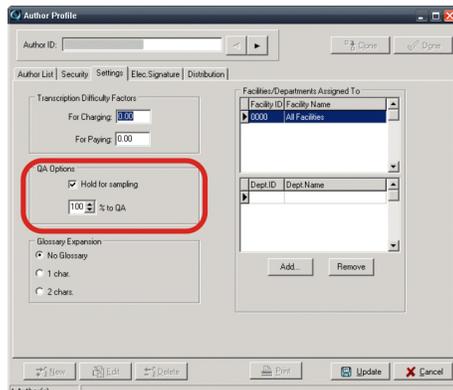


Figure 9, QA Percentage by Author, User or content source—very useful for challenging or degraded material

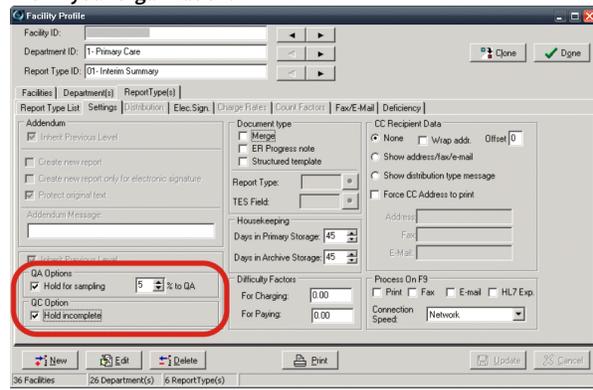


Figure 10, QA Percentage configured by Report Type

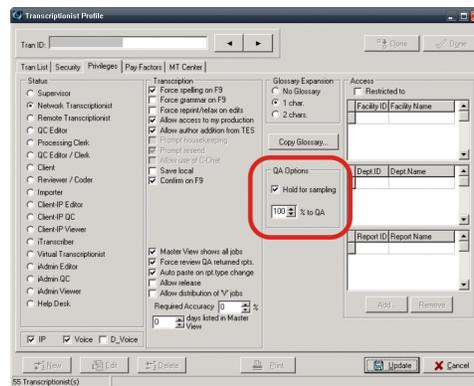


Figure 11, QA Percentage by Transcriptionist

This allows for easy checking and modification of any report parameters. A user working from this screen (i.e., before being released to QA) can review lists of available customer personnel (Figure 12) and their related data. This data is routed from the Bureau's database, instantly and automatically, to the entry screen used by administrative, transcription and QA staff.

Author ID	Last Name	First Name	Initials	Alternate ID	Title	Specialty	Address	Facility ID
78432	Hauke	Verkata Roma	VRD		M.D.	VASLC - H		35
78972	Rehder	Justin	JB		M.D.	VASLC - A		36
78984	Rehder	Allison L.	ALJ		M.D.	VASLC - D		36
78984	Rehder	Adam L.	ALC		M.D.	VASLC - H		39
78985	Rehder	Gregory L.	GLL		M.D.	VASLC - G		40
78972	Rehder	Altere	AB		M.D.	VASLC - R		36
78972	Rehder	Sarah T.	STG		M.D.	VASLC - R	78972-0000000000	36
78983	Rehder	Genaro	GF		M.D.	VASLC - H		45
78985	Rehder	Matthew	MW		M.D.	VASLC - H		43
78972	Rehder	Ryan L.	RLR		M.D.	VASLC - IN		35
78985	Rehder	Ibrahim	IAR		M.D.	VASLC		43
78972	Rehder	Anun K.	AKS		M.D.	VASLC - T		36
78980	Rehder	Edward C.	ECL		M.D.	VASLC		35
78972	Rehder	Donald M.	DME		MS	VASLC - P		39
78972	Rehder	Richard	RO		M.D.	VASLC		42

Figure 12, Author lookup allows production staff to search for and select customer participants from the Bureau's database.

Demographic information (e.g., name, SSN, codes, dates, etc.) and the transcribed document along with many other relevant data fields (i.e., turnaround time, delivery status, electronic signature status, count statistics, transcriptionist comment notes, etc.) are automatically stored for every report document and are automatically added to logs given to customers. These can also be used to search for reports as necessary.

The QA Department will follow a written, standardized system of processes based on guidelines from Alaska, approved templates, ongoing directives and Bureau standards along

with ongoing feedback from transcription, managerial and customer staff.

Each error or variance type within a report is assigned one of four (4) severity levels. (Figure 13 and Figure 14–below) Once a report has been queued and reviewed by QA staff, error scores are added and an accuracy score is calculated by subtracting the error score from 100. These are based on rigid guidelines uniquely formulated for each customer and follow this criteria:

1. Critical error in format or basic spell check error (- 8 points each)
 - A. Failure to follow standard formatting protocols for the given report type
 - B. Failure to correct an error highlighted during spell check or incorrect use of a figure, table, section, phrase or word-expansion glossary entry
 - C. Misspelling of any name automatically populated by the database, as provided by speaker or subjects or any names correctly spelled by speaker
2. Major errors (- 4 points each)
 - A. Incorrect jargon, terms or data
 - B. Failure to transcribe recorded material verbatim upon request other than to note grammatical errors made by a speaker (e.g., [sic], [intentionally spoken], etc.)
 - C. Punctuating a sentence in such a manner as to change its meaning

- D. Addition/omission from recording for no apparent reason, unless asked to edit recorded material during recording or by facility liaison
 - E. Incorrect entry of subject demographic information into predetermined data entry screen or header format
 - F. Excessive blanks without valid documentation of cause
 - G. Failure to follow pre-formatted headers or text headings in the template document and outlined/directed by client
 - H. Failure to follow any additional transcription guidelines requested by client in accordance with professional standards
 - I. Improper use of abbreviations where forbidden (e.g., diagnoses, judgements)
 - J. Technical document errors including incorrectly overriding the automatic template selection for report, use of typed characters which preclude proper interfacing with other software programs (e.g., the degree symbol, foreign language characters) or failure to use section, line or page break properly.
 - K. Failure to use reference material provided by the Bureau resulting in blanks within transcription
3. Minor errors (- 1 point each)
- A. Use of incorrect non-technical/non-jargon word or wrong form of word
 - B. Addition/deletion of insignificant words (e.g., “of,” “to,” “the,” etc.)
 - C. Incorrect verb/tense usage, even if recorded incorrectly except for verbatim
 - D. Failure to use appropriate capitalization protocols
 - E. Failure to use basic word processing skills (e.g., using spaces instead of tab or indent resulting in misalignment of text, incorrect font usage, etc.)
 - F. Repetition of the same error within same report
4. Author/Note/Subject directive or procedural errors (- 0 points each)
- A. Uncorrectable error in procedure, directive or data entry made by the authors or recorded subjects
 - B. Audio error such as inaudible speech, garbled speech, mumbling or recording device issues
 - C. Notes which QA staff track, but do not in-and-of-themselves constitute an error

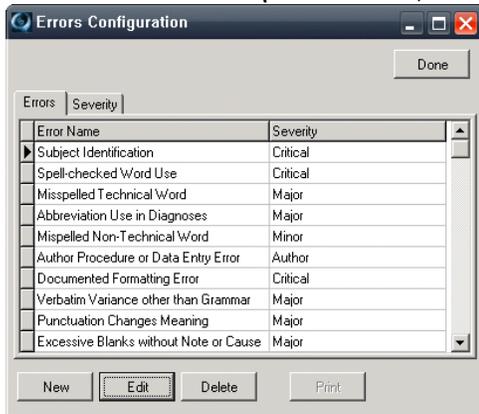


Figure 13, Error name identifiers and severity assignments as shown on the QA Errors screen.

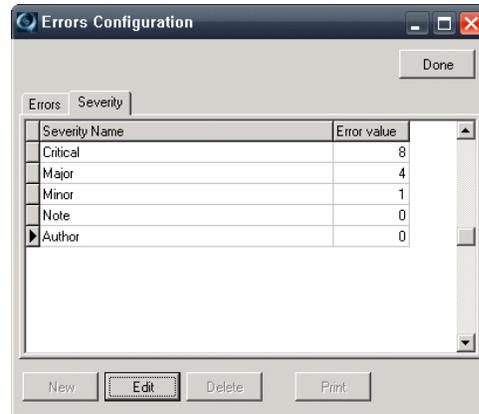


Figure 14, Corresponding Severity value used for QA scoring.

Accuracy scores are tallied automatically into the primary report document database and QA database by subtracting any documented variances or errors from 100. The *required accuracy* score stored for each report is a 0 to 100 grade which will flag a report if it falls below a set value. This will be configured to 98 for all Alaska documents. Reports that fall below the required

accuracy score are automatically routed back to the transcriptionist for mandatory review. These must be reviewed by the transcriptionist before they are allowed to continue to work.

Transcriptionist individual and aggregate scores are generated in both detail and summary reports and are administratively reviewed during payroll generation every two weeks. These reports show the frequency of each type of error, the severity of each error as well as the average score by report and average severity of errors.

This data can be securely accessed by Alaska staff using the Bureau's secure internet reporting capability.

G. Responding to Fluctuations to Ensure No Overload (Customer Service g.)

Like all businesses, the Bureau experiences workload and production variations. For example, from a long-term historical perspective in the long view, over the past 10 years, production volume has fluctuated between 22 million to 78 million lines per year. Of course, long-term volume fluctuations are much easier to deal with than short-term fluctuations.

The Bureau has three mechanisms to deal with this: A) activate part-time staff, B) cross-train transcriptionists who are permanently assigned to contracted accounts and C) accept work with a mutually-agreed-upon extended turn-around time.

The Bureau currently employs just under 60 production staff. Based on a 2016 workload of 34.5 million lines of text and maximum production capacity of roughly 44 million lines, the Bureau has an excess capacity of roughly 9.5 million lines or 27.5%. That calculation is taken in terms of a yearly perspective. From a daily perspective, fluctuations can easily vary much more. Every month, the Bureau uses at least a few of the 12 part-time production staff. These 12 staff, when available, add roughly another 9.5 million lines of capacity or another 27.5%.

Further, the Bureau assigns specific employees to work on specific primary accounts day-to-day as well as secondary accounts. These are intentionally overlapped. In other words, one Bureau production employee will be assigned accounts A and B as their primary assignment and have accounts X and Y as their secondary account. Another Bureau employee will have those assignments reversed—X and Y are their primary account and A and B are their secondary. Cross-training employees ensures that times of low workload volumes, others calling in sick, vacations and fluctuations can be more easily absorbed. All Bureau production staff and managers are cross-trained.

C. Technology

1. Methods for Order Submission (Technology a.)

The Bureau has several options for customers to use for simultaneous recording capture. Customers may use just one or may use many methods depending upon what makes sense.

More specifically, recorded media may be sent to the Bureau via six (6) primary methods:

- Direct customer upload to the Bureau's secure, on-site web and SFTP servers (Figure 15 and Figure 16)
- The Bureau's toll-free (1-800) multi-tenant dictation system
- Streamed recording directly to Bureau servers in real-time
- Digital portable recorder (e.g., Grundig, Marantz, Olympus, Philips, Sony, etc.)

- Physical digital media (e.g., CD, DVD, portable hard drive, USB “thumb” drive, etc.) and analog media (e.g., cassette, video tape) sent via carrier or picked up by Bureau courier
- Streamed directly from the internet from customer systems or third-party servers (e.g., YouTube™, vimeo®, etc.)

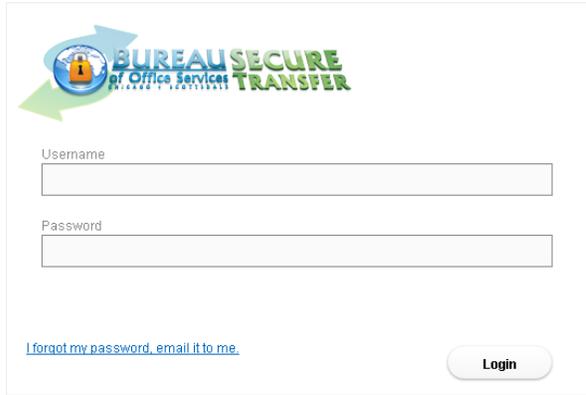


Figure 15, The Bureau’s secure transfer site.

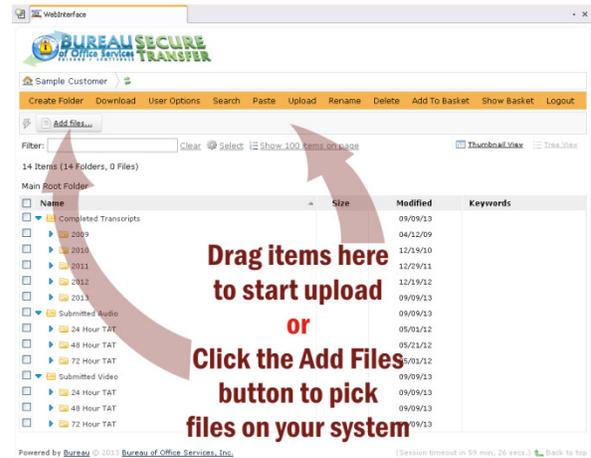


Figure 16, Transfer screen for customers to drag and drop media as well as download completed transcripts



Figure 17, The highest level of authentication and encryption is supported using the latest web browsers on all major desktop and mobile platforms.

Bureau FTP and web servers are configured to default to the highest levels of authentication and encryption currently supported—256-bit AES encryption. (Figure 17)

Before transfer, customers can optionally be prompted upload forms. (Figure 18) This is especially valuable for agencies which require precise tracking information to be included with each recording such as:

- Subject, interviewer and participant names with correct spelling
- Case, examination, incident or other tracking number(s)
- Important dates and times (e.g., date of birth, incident, etc.)
- Location(s)
- Priority
- ...anything else important for your organization’s specific need

As with custom voice prompts used for telephone dictation and recording, individual fields within these forms can be flagged as *mandatory*. This will force users to provide any number of specific data field information items before they are allowed to start recording or transmitting data.

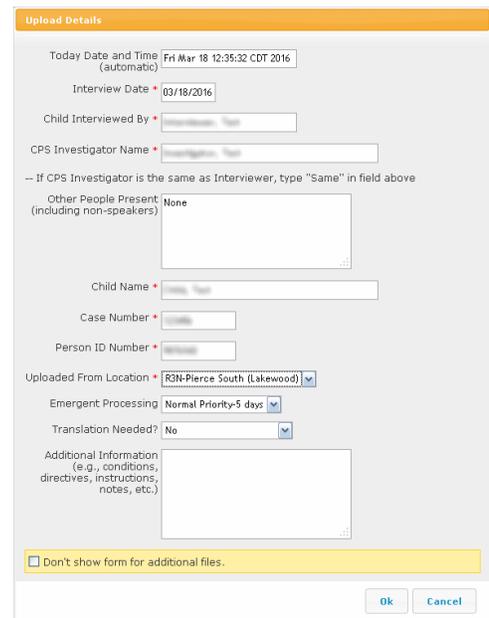


Figure 18, The optional custom Upload Details screen for a State government customer. This automatically prompts users for mandatory customer-specific information for all recording jobs sent to the Bureau.

Optionally, automatic transfers to Bureau servers can be configured. The Bureau has automated and scheduled transfer available using secure channels such as site-to-site VPN, NAT-to-NAT VPN, on-demand VPN or to SFTP and web server. The Bureau maintains an on-staff IT department that is experienced with a variety of transfer automation, authentication and encryption technologies.

Historically, the majority of customer submissions are received by the Bureau’s web and SFTP servers or the Bureau’s 1-800, toll-free recording line. However, no preference is given to any of the methods and all are perfectly acceptable. Our goal is to receive recordings that are:

- Clear with little noise
- Normal speaking clarity and volume
- Sent with accurate and complete data

2. Ability to Easily Support Submissions of Multiple Orders from Multiple Locations (Technology b.)

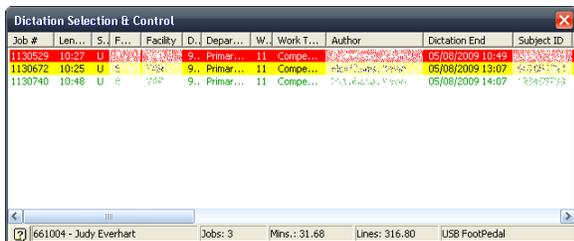


Figure 19, Items awaiting completion are automatically routed and prioritized by several automatically activated parameters. Items can also be manually re-prioritized at any time. These are dynamically sorted and displayed.

Bureau FTP servers, web servers, dial-in dictation systems, streaming capture servers and foreign system interfaces can capture hundreds of recording simultaneously. Further, each recording job is automatically tracked and categorized by specific customer information as they are sent. (See Section 1 above)

Once recorded media is received, the Bureau’s platform automatically transcodes each recording and it becomes a routable job in our

platform. Each job is tagged for a specific customer, customer category (e.g., department, division, group, location, etc.), author/submitter, work type along with 22 other optional, customer-specific fields in the Bureau’s database.

The Bureau tracks and dynamically assigns priority using five (5) parameters. (Figure 20)

Work Prioritization Options	
Priority and Routing Activation Method	Description
Report Type	Assigned by organizing routing group assignments in production transcription staff profiles
Age	Determined dynamically (i.e., <i>current time – time of recording completion</i>)
Trigger Time	Configured for each work type routing group and normally set to between 1/3 and 1/2 turnaround time for normal priority reports and 1/4 turnaround time for higher priority reports
Turnaround Time	Configured for each work type routing group and set to specifications Multi-level and assigned by:
Assigned Priority	<ul style="list-style-type: none"> ➤ Author assignment (i.e., designated during or after recording) ➤ Bureau staff or authorized customer staff assignment ➤ Exceeding Trigger or Turnaround Time automatic assignment

Figure 20, Multi-level, automatic routing and prioritization is built-in to the Bureau’s workflow process.

Recordings are automatically prioritized and re-prioritized as they age in the Bureau’s system. The priority level and color of any job changes automatically as jobs approach a pre-configured trigger times and/or the configured turnaround time. (Figure 21)

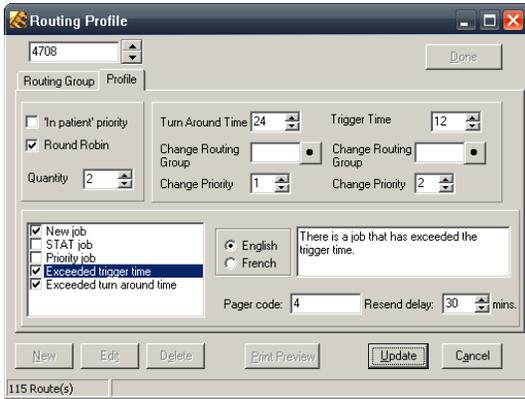


Figure 21, Routing Profiles for each work type or a group of work types ensure recorded jobs are automatically re-prioritized as they get closer to their assigned turnaround time. Automatic pager and telephone notification options ensure staff know when a turnaround event is imminent.

Because of the Bureau’s automated prioritization, notification and monitoring, the Bureau has met turnaround time criteria for historical and current transcription contracts at a verifiable rate of 99.96% as measured on a per-recording/per-document basis. The automatic features of Bureau systems assure that no report that is properly classified will need manual intervention to be prioritized and routed correctly.

Once recordings are captured, Bureau staff directly transcribe into the precise template automatically selected by the Bureau’s platform.

After transcoding and prioritization, each job is automatically routed by customer and customer category to transcription queues. Transcriptionists assigned to those queues immediately see these recordings as sorted, multi-column, colored database listings which show priority, customer information, author, routing and other relevant demographics. (Figure 19 and Figure 22)

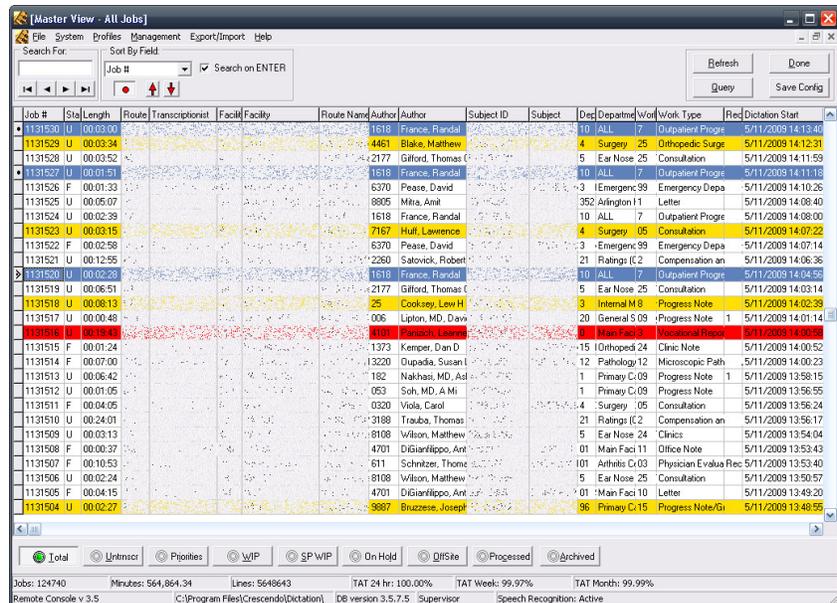


Figure 22, The Master View screen displays details about all jobs or specified jobs (e.g., by author, date(s), report type, index, subject, etc.) in an easy-to-use spreadsheet-like screen. Note: Customer staff are limited to viewing jobs only for their organization or organizational subdivision.

Bureau administrators, executive, technical staff as well as customer staff see this in real time.

No manual intervention is necessary during the normal processing of customer media. When a job is selected, the latest version of the correct customer template is automatically selected and transcription begins.

All work is processed in the Bureau’s media and document management platform. This means that all reports start out at a data entry screen (i.e., called the TES—Transcription Entry Screen) where customer data is validated and stored in the Bureau’s database. (Figure 23) This also allows transcription and QA staff to search for previously-saved individuals in the future such as:

- Authors and submitters—officers, investigators, case workers, lawyers, etc. (Figure 24)
- Subjects—citizens, suspects, clients, litigants, patients, witnesses, etc. (Figure 25)
- Subject and Incident Identifiers—accession, account, case, encounter, exam, record, specimen, visit codes, etc.
- Dates—DOBs, encounter dates, event dates, visit dates, etc. (Note: multiple date storage and lookups is allowed)
- Assigned Participants (i.e., primary and referring individuals, officers, PCPs, case workers. Note: Multiple selections and lookups are allowed.)

This also means that the names, addresses, work codes, badge numbers, titles and other information tied to your staff are not manually typed. Instead, this data is automatically inserted. The same is true for your subjects (i.e., participants, patients, suspects, witnesses, etc.)—their data is stored in our system for a pre-determined period so that when you staff say a name, that data is automatically populated into your documents. Our systems are designed to allow our staff to maximize automation and minimize manual entry.

3. File Format Requirements (Technology c.)

The Bureau supports a wide range of file and streaming formats for both submitted recordings and delivered documents.

Customers may submit recorded media directly to Bureau servers in real time or on an automated schedule. The Bureau directly transcribes recorded digital and analog formats. This also includes streamed and real-time telephone recordings. Recordings can be sent in over 75 digital audio and video formats of varying bit rates. The Bureau has daily exposure to transcoding, stream capture and a host of other complex media processing tasks. Capability includes the listed formats below. (Figure 26) Additional audio and video CODECs not currently supported will be licensed, installed upon notification.

Sample Listing of Bureau Media Capability					
File Type	Ready Status	File Type	Ready Status	File Type	Ready Status
wav	YES	vox	YES	msv	YES
ogg	YES	aac	YES	dvf	YES
mpc	YES	mp4/m4a	YES	ivs	YES
flac	YES	mp3	YES	m4p*	PARTIAL
aiff	YES	wma/wmv	YES	lklax	YES
raw	YES	atrac	YES	mxp4	YES
au	YES	ra	YES	3gp*	PARTIAL
gsm	YES	ram	YES	amr	YES
dct*	PARTIAL	dss/ds2	YES	avi	YES

Figure 26, Bureau audio format table which shows current capability. *Customer must provide unique encryption decoding license, user license and/or password first for these individually-protected and copyrighted licensed formats.



Figure 23, TES data entry validation.

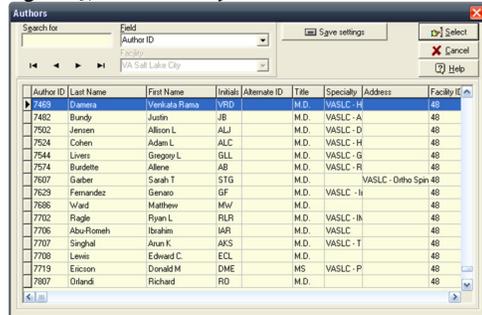


Figure 24, Author lookup database from TES.

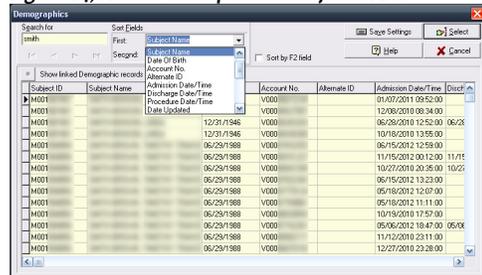


Figure 25, Subject lookup database from TES.

directed. This may also include variations in distribution methods, involvement of approved third parties, use of special security procedures, embedded graphics, time-coded video frames, color coding of text, electronic and facsimile signatures, tables, columnar formatting, links, indexes and embedded or linked non-document media and metadata. The Bureau has decades of high-volume printed and multi-media production experience in the commercial, law enforcement, legal and healthcare fields. (Figure 29 through Figure 38)

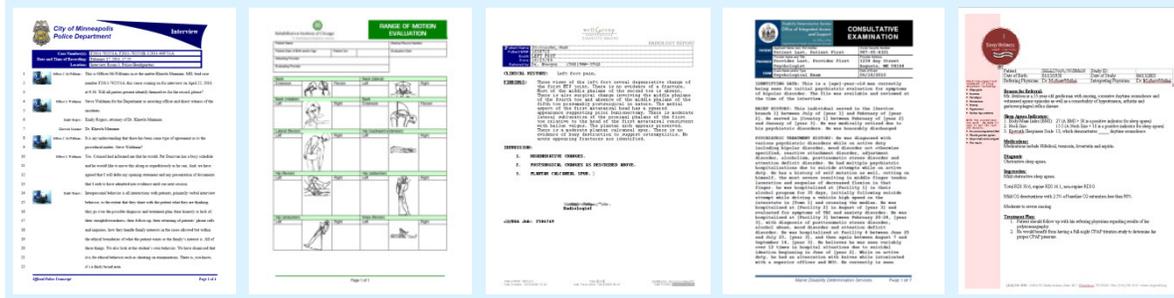


Figure 29

Figure 30

Figure 31

Figure 32

Figure 33

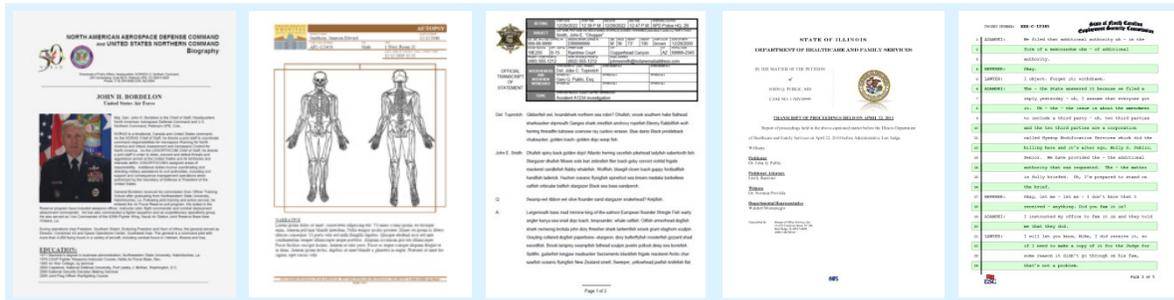


Figure 34

Figure 35

Figure 36

Figure 37

Figure 38

All completed work will be delivered by mutually agreed upon protocols such as:

- Secure transmission protocols with authentication and encryption (e.g., HTTPS, FTPS, SFTP, VPN, SSL, multi-factor, etc.)
- PKI-based, asymmetrically encrypted e-mail (i.e., certificate-based, third-party authentication, public key encryption)
- Encrypted format delivered on optical CD and/or DVD media for backup and special requests
- Pre-verified fax in monochrome or color for STAT work and special requests
- Hard-copy printed, copied, bound and courier-delivered

Each electronic transmission of individual documents can be secured by:

- Session-based encryption (e.g., SFTP, SSH, SSL, VPN, etc.)
- Application and/or encapsulation encryption
- PKI-based e-mail
- An overlapping combination of the above referenced technologies

The Bureau has secure, triple-redundant network peering capability on-site which allows us to reliably accept and deliver work using virtually any protocol and encryption technology. Any method used will follow current and updated task orders, be pre-approved and meet or exceed federal requirements along with current customer technical capability.

Data Security and Confidentiality (4.5.2)

A. Methods of Protection

From the time recorded media is securely transferred from customers to the Bureau to the time a completed document is securely transferred back to the customer, all data is transmitted and stored only on secure Bureau-owned systems and servers located within secured Bureau facilities. Each step of the process is both tracked and logged so chain-of-custody can be verified and audits performed on each data element involved. Once customer data have been delivered, it is automatically and securely “wiped” (i.e., deleted and overwritten) after a set period of time.

The Bureau uses policy and technical controls at every step of processing to ensure data is encrypted and secure. This includes:

- Both external customer users and Bureau users must log in and authenticate using approved authentication protocols to initiate contact with all Bureau platforms
- All Bureau workstations use “full disk” encryption with TrueCrypt. This fully encrypts all connected storage. The entire operating system, all installed third-party software, all working data sets, all databases and all temporary data is encrypted
- All administrative and production workstations are Bureau-owned and managed (i.e., no workers using mixed-use, family-accessible or shared systems)
- Real-time, up-to-date anti-virus along with third-party and built-in anti-malware software constantly monitoring systems
- Corporate policy mandates users only using their own personal login credentials
- Only Bureau-owned and Bureau-licensed software is used for production
- Disallow the install of new software or change of critical settings using system policy
- Web configuration only allows use of secured browsers with:
 - Advertisement blocking
 - Script blacklist and whitelist
 - Blacklist IP range and domain name blocking
- Completed work (document files) will be uploaded and downloaded to and from secure Bureau websites (HTTPS) and/or secure file transfer sites (FTPS) sites depending upon what is most convenient for Waukesha staff.
- Bureau websites will be configured to use up-to-date and compliant cipher suites that include AES-256 encryption.
- All Bureau staff access data through the Bureau’s streaming production platform. The Bureau’s platform completely automates media prioritization, playback and transcript document processing. No manual administration, distribution, data tracking, file tracking or folder management is required for normal workflow.

All browsers capable of supporting TLS AES-256 encryption can access the Bureau’s secure transfer portal site. To prevent man-in-the-middle (“MITM”) attacks, the Bureau only accepts authenticated and encrypted connections (i.e., “HTTPS”) to production transfer sites without automated redirection from an unauthenticated and unencrypted (i.e., “HTTP”) connection. The following approved cipher suites are active on the Bureau production FTP and web portal:

- TLS ECDHE ECDSA WITH AES 256 CBC SHA384
- TLS ECDHE RSA WITH AES 256 CBC SHA384
- TLS RSA WITH AES 256 CBC SHA256
- TLS ECDH ECDSA WITH AES 256 CBC SHA384
- TLS ECDH RSA WITH AES 256 CBC SHA384
- TLS DHE RSA WITH AES 256 CBC SHA256

- TLS DHE DSS WITH AES 256 CBC SHA256
- TLS ECDHE ECDSA WITH AES 256 CBC SHA
- TLS ECDHE RSA WITH AES 256 CBC SHA
- TLS RSA WITH AES 256 CBC SHA
- TLS ECDH ECDSA WITH AES 256 CBC SHA
- TLS ECDH RSA WITH AES 256 CBC SHA
- TLS DHE RSA WITH AES 256 CBC SHA
- TLS DHE DSS WITH AES 256 CBC SHA

The latest versions of the most popular desktop and mobile web browsers work with the Bureau's web portal, including:

- Chrome
- Edge
- Internet Explorer
- Firefox
- Opera
- Safari
- SeaMonkey

The Bureau also maintains direct and secure site-to-site VPN connections with many customers. This allows for the continuous transfer of data in a secure fashion 24/7/365. This is in addition to secure file transfer (SFTP) and secure web platforms (HTTPS) for both interactive and automated transfer of media, documents and administrative material.

Customer data is configured within the Bureau database for designated retention periods. (Figure 39 and Figure 40) After expiration, all audio and document records are automatically wiped from the Bureau's database. Purge logs are kept for verification and compliance.

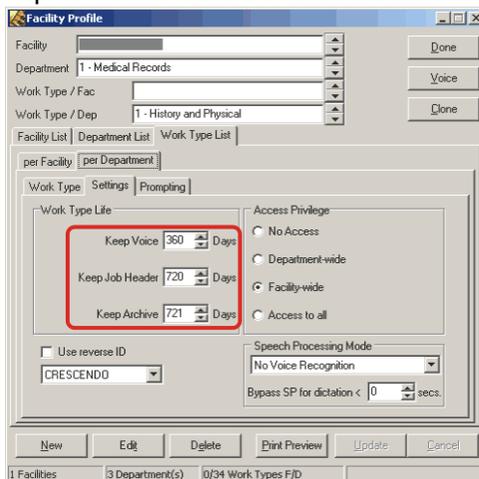


Figure 39, The Bureau platform is configured to archive, maintain tracking data and purge stored media after a set number of days on a customer, department/division and work type basis.

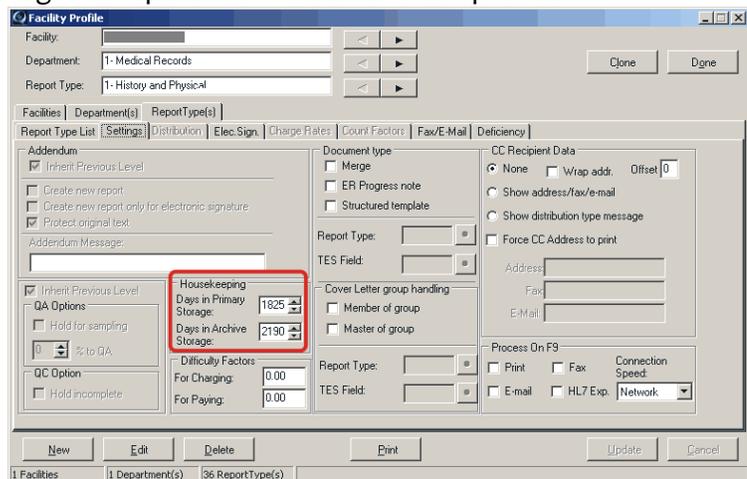


Figure 40, The Bureau platform also has equivalent storage, archive and purging parameters for stored documents.

Early every morning, a housekeeping process automatically runs, marks, purges and logs every recording job and document that has exceeded parameters. (Figure 41) Work will be configured to maintain this data for an agreed-upon length of time.

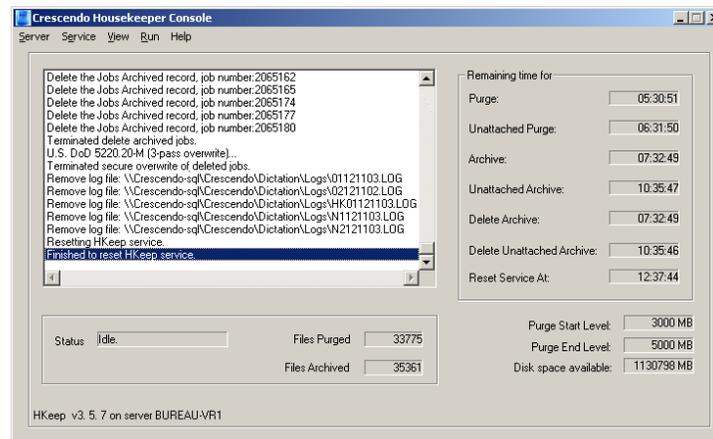


Figure 41, The Housekeeping service automatically performs the archive, record deletion and purge processes every day, 365 days a year.

B. Security Events

The most common security events relate to IT-related and telephone security. This includes both annoyances and active criminal behavior such as:

- SPAM e-mail, faxes and telephone calls
- Socially-engineered e-mail, fax and telephone information collection incidents
- Criminal fraud and fraud attempts via e-mail, fax and telephone
- Automated information collection, “cracking” and data interception
 - Network probes
 - Denial-of-service events
 - Automated log in attempts
 - ... and more

A huge variety of these events are tracked and automatically reported in the logging by Bureau’s network security appliances. A selection of these that pass pre-set thresholds are reported to the Bureau’s performance monitoring platform. Those that are disruptive or potentially dangerous are actively tracked in the Bureau’s issue tracking system.

Should a security incident occur which includes, but is not limited to, the unintentional release of confidential or protected information, all relevant customer staff will be notified as outlined in the Solicitation and accompanying Terms and Conditions documents.

C. Confidentiality

All Bureau staff members are under contract and sign an encompassing customer data security clause. Three other contract clauses deal with ethics, data security and person-to-person data sharing. The Bureau will also have all staff members working on this project complete any additional customer-specific confidentiality and security agreements, as needed, before they will be allowed to work.

Bureau administrative, production and technical staff that are assigned to specific intelligence and military projects are also required to obtain Federal security and privacy certifications along with ANACI security clearance.

References (4.5.3)

Client Reference Form

Offeror Information

Company Name (Offeror): Bureau of Office Services, Inc.	Company (Offeror) Address: Bureau of Office Services, Inc. 11s270 S Jackson Street, Suite 106 Burr Ridge, IL 60527-6818
Name of Project: Transcription	

Client Information

Organization Name (Client): HeplerBroom LLC	Organization Address: 221 N. LaSalle Street, Suite 2300 Chicago, IL 60601
Person Providing the Reference: Ms. Annie Lopez	Title: Paralegal
Phone Number: (312) 477-0710	Email address: Annie.Lopez@heplerbroom.com
Reference Signature & Date: <i>Annie R. Lopez 3/21/17</i>	

The person providing the reference, as identified above, must provide the following information. This person must be a responsible party of the organization for which the work was performed. This person should have comprehensive knowledge about the project and the company's (Offeror) role and responsibilities within the project.

1. Briefly describe the services provided by the company identified above.

Transcription Services

2. Rate each of the following concerning this company's performance using the ratings below:

- S – Strongly Agree/Very Positive
- A – Agree/Positive
- N – Neutral
- D – Disagree/ Negative
- F – Failed

Rating

- S A. This company ensured the project deliverables were completed on time and within the agreed budget.
- S B. This company provided the appropriate resources to the project.
- S C. This company was knowledgeable in providing the services.
- S D. The business relationship with this company was positive and cooperative, versus negative and adversarial.
- S E. This company provided open, timely communications, and was responsive to our needs and requirements.
- S F. I would choose to work with this company again.

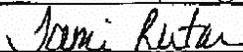
Additional Comments:

Client Reference Form

Offeror Information

Company Name (Offeror): Bureau of Office Services, Inc.	Company (Offeror) Address: Bureau of Office Services, Inc. 11s270 S Jackson Street, Suite 106 Burr Ridge, IL 60527-6818
Name of Project: Transcription	

Client Information

Organization Name (Client): Pender Community Hospital	Organization Address: 100 Hospital Drive Pender, NE 68047
Person Providing the Reference: Mrs. Tami Rutar	Title: Transcription and Scanning Coordinator
Phone Number: (402) 385-1991	Email address: rutart@mercyhealth.com
Reference Signature & Date:  3-21-17	

The person providing the reference, as identified above, must provide the following information. This person must be a responsible party of the organization for which the work was performed. This person should have comprehensive knowledge about the project and the company's (Offeror) role and responsibilities within the project.

- Briefly describe the services provided by the company identified above.**
BOS transcribes dictation for our providers and specialty clinic providers at the Pender Community Hospital.
- Rate each of the following concerning this company's performance using the ratings below:**

- S – Strongly Agree/Very Positive
- A – Agree/Positive
- N – Neutral
- D – Disagree/ Negative
- F – Failed

Rating

- S A. This company ensured the project deliverables were completed on time and within the agreed budget.
- S B. This company provided the appropriate resources to the project.
- S C. This company was knowledgeable in providing the services.
- S D. The business relationship with this company was positive and cooperative, versus negative and adversarial.
- A E. This company provided open, timely communications, and was responsive to our needs and requirements.
- A F. I would choose to work with this company again.

Additional Comments:

I took over the transcription department for the hospital and clinics upon the retirement of the previous HIM director the summer/fall of 2016. Every contact I've had with BOS has been positive. They have been very helpful and patient with all of my questions. Their turnaround time is very good, usually within 24 hrs. Mike and Fred are always pleasant when I need to call them which isn't that often.

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Client Reference Form

Offeror Information

Company Name (Offeror): Bureau of Office Services, Inc.	Company (Offeror) Address: Bureau of Office Services, Inc. 11s270 S Jackson Street, Suite 106 Burr Ridge, IL 60527-6818
Name of Project: Transcription	

Client Information

Organization Name (Client): Rehabilitation Institute of Chicago (RIC)	Organization Address: 345 E. Superior Chicago, IL 60611
Person Providing the Reference: Ms. Bridget Watson	Title: Medical Records
Phone Number: (312) 238-6185	Email address: bwatson@ric.org
Reference Signature & Date: <i>Bridget Watson 3/21/17</i>	

The person providing the reference, as identified above, must provide the following information. This person must be a responsible party of the organization for which the work was performed. This person should have comprehensive knowledge about the project and the company's (Offeror) role and responsibilities within the project.

1. Briefly describe the services provided by the company identified above.

GREAT TRANSCRIPTION COMPANY

2. Rate each of the following concerning this company's performance using the ratings below:

S – Strongly Agree/Very Positive
A – Agree/Positive
N – Neutral
D – Disagree/ Negative
F – Failed

Rating

- A. This company ensured the project deliverables were completed on time and within the agreed budget.
S
- B. This company provided the appropriate resources to the project.
S
- C. This company was knowledgeable in providing the services.
S
- D. The business relationship with this company was positive and cooperative, versus negative and adversarial.
S
- E. This company provided open, timely communications, and was responsive to our needs and requirements.
S
- F. I would choose to work with this company again.
S

Additional Comments: Boss is very knowledgeable of the Services they provide, Very Professional and I would recommend them to any Company.

Client Reference Form

Offeror Information

Company Name (Offeror): Bureau of Office Services, Inc.	Company (Offeror) Address: Bureau of Office Services, Inc. 11s270 S Jackson Street, Suite 106 Burr Ridge, IL 60527-6818
Name of Project: Transcription	

Client Information

Organization Name (Client): US Navy, Navy Medicine Inspector General BUMED	Organization Address: Bureau of Medicine and Surgery (BUMED) Falls Church, VA 22042
Person Providing the Reference: Ms. Sharon Newman	Title: COR
Phone Number: (571) 215-0489	Email address: sharon.l.newman10.civ@mail.mil
Reference Signature & Date: NEWMAN.SHARON.L.1230441525	<small>Digitally signed by NEWMAN.SHARON.L.1230441525 DN: cn=US, o=U.S. GOVERNMENT, ou=OAS, ou=PM, ou=USN, c=NEWMAN.SHARON.L.1230441525 Date: 2017.03.21 11:52:31 -0400</small>

The person providing the reference, as identified above, must provide the following information. This person must be a responsible party of the organization for which the work was performed. This person should have comprehensive knowledge about the project and the company's (Offeror) role and responsibilities within the project.

1. Briefly describe the services provided by the company identified above.

Military Court Martial Transcription

2. Rate each of the following concerning this company's performance using the ratings below:

- S – Strongly Agree/Very Positive
- A – Agree/Positive
- N – Neutral
- D – Disagree/ Negative
- F – Failed

Rating

- S A. This company ensured the project deliverables were completed on time and within the agreed budget.
- S B. This company provided the appropriate resources to the project.
- S C. This company was knowledgeable in providing the services.
- S D. The business relationship with this company was positive and cooperative, versus negative and adversarial.
- S E. This company provided open, timely communications, and was responsive to our needs and requirements.
- S F. I would choose to work with this company again.

Additional Comments:

BOS worked with Navy Medicine to ensure there was no gap in service when the contract was recompeted but the award was delayed. They always put the customer's needs first.

Figure 42, Attachment D. References

Note: An fourth reference is provided in case a contact is on vacation, sick or otherwise unresponsive to inquiries. Additional task-specific references are available upon request.

Scope of Work (4.5.4)

A. General Transcription Services (SOW A.1.)

General Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
1. The Contractor shall provide transcription services as detailed in this scope of work. The following requirements apply to all services provided by the awarded Contractor (s) within this scope of work of this solicitation.	YES
2. The Contractor must have access to necessary equipment to provide complete transcription services as required. The Lead State reserves the right to refuse, at its sole discretion and notwithstanding any prior approval, any personnel of the Contractor providing service in the performance of this contract. The Lead State will document in writing the reason(s) for any rejection of personnel.	YES
3. The Contractor shall have the capability of providing audio to text and video to text.	YES
4. All transcriptions must be reviewed, proofread, spell-checked, demographically checked, and correctly formatted.	YES
5. The Contractor shall establish a secure file transfer protocol (SFTP) or equivalent website for use in transferring documents to and from the participating entity.	YES
6. Upon receipt of an electronic transcript request from the purchasing entity, the Contractor shall download the digital recording from the SFTP or equivalent or equivalent site. Participating entity may submit audio recordings by audio cassette, CD, or other physical format. The Contractor is responsible for retrieving and returning audio cassette, CD, or other physical format submitted. The Contractor shall be responsible for all costs associated with shipping.	YES
7. The participating entity shall be given the opportunity to review, approve and accept all work ordered and received by the participating entity. All materials for review shall be delivered to the participating entity via the Contractor 's SFTP or equivalent site, or other agreed upon delivery method. If corrections are needed, the Contractor shall submit the corrections within 24 hours of notification from the participating entity. Corrections shall be made at no additional charge. a. Contractor must maintain a 90% accuracy rate. If over ten percent (10%) of total monthly transcriptions for any participating entity requires retypes or corrections, the Lead State shall work with the Contractor on a resolution and take any necessary measures allowed to resolve the situation.	YES
8. Deliverable deadlines shall be agreed upon by participating entity and Contractor prior to order placement.	YES

General Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
<p>9. The Contractor shall maintain an electronic library of all transcriptions for audit purposes for one year from date of acceptance.</p> <p style="margin-left: 20px;">a. The Contractor shall log all transcriptions. The specific data to be logged will be determined by the participating entity.</p> <p style="margin-left: 20px;">b. The Contractor shall have the capability to generate reports from the log as requested by the participating entity. Reports shall be delivered to participating entity via the SFTP or equivalent site or email as requested by the participating entity.</p>	<p>YES (for a. & b.)</p>
<p>10. The Contractor must comply with all provisions of any legislative changes or administrative rule changes enacted or adopted during the term of the contract at no cost to the participating state.</p>	<p>YES</p>
<p>11. The Contractor shall be held responsible for the security of its premises and assumes all risk.</p>	<p>YES</p>
<p>12. The Contractor acquires no title or rights to any of the data it receives and transcribes for the participating entity.</p>	<p>YES</p>
<p>13. The Contractor shall provide a method for recording dictation 24 hours a day, 365 days a year.</p> <p style="margin-left: 20px;">a. Dictation method may include a toll-free telephone number dedicated to each participating entity, hand-held dictation device, PC microphone, or other approved method. The Contractor must provide a mechanism to give priority to records that are needed immediately (i.e., a dedicated line).</p> <p style="margin-left: 20px;">b. Must have capability of single speaker dictation and multiple speaker recordings.</p>	<p>YES</p>
<p>14. All recordings must be able to be paused, rewind, and fast-forwarded.</p>	<p>YES</p>
<p>15. The length of time a recording is maintained, the destruction of a recording; and any other use of the recorded data shall be determined by the participating entity.</p>	<p>YES</p>
<p>16. The transcriptionists must understand and apply correct English grammar, spelling and punctuation skills.</p>	<p>YES</p>
<p>17. The Contractor shall have an established system for quality assurance and quality control to ensure the accuracy of dictations and transcriptions, required reports and bill documents.</p>	<p>YES</p>
<p>18. If Contractor finds that a recording is inaudible, the Contractor shall send the recording to the participating entity, who will verify that the recording is inaudible. If the recording is audible, the Contractor will be contacted to download the recording and prepare a transcript.</p>	<p>YES</p>

General Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
<p>19. The Contractor shall track all security events and shall report such security incidents immediately, with the following understandings.</p> <ul style="list-style-type: none"> a. The participating entity shall not consider as security event, for the purpose of reporting, external activities (port enumeration) typically associated with the “foot printing” of a computing environment so long as such activities have only identified but have not compromised the logical network perimeter, including but not limited to externally facing firewalls and web servers; b. The Contractor shall reasonably use its own vulnerability assessment of damage potential and monitoring to define levels of security incidents and responses for the Contractor’s operations. However, the Contractor shall immediately notify the Lead State contact, and ordering agency of any security event which would constitute a security event including any “breach of the security of the system” under state law, in a preliminary report within one (1) business day with a full report within five (5) business days of the time the Contractor became aware of the event; and c. The Contractor shall likewise notify the Lead State contact in a preliminary report within one (1) business day of any unauthorized acquisition including but not limited to internal user access to non-test records reported to the Contractor’s privacy manager or other appropriate personnel; and any use, disclosure, modification or destruction of confidential information by an employee or otherwise authorized user of its system of which the Contractor becomes aware with a full report of the event not less than five (5) business days of the time it became aware of the event. 	<p>YES (for a., b. & c.)</p>
<p>20. If data acquired (including but not limited to access to or use, disclosure, modification or destruction of such data) is in encrypted format, but the decryption key which would allow decoding of the data is also taken, the parties shall treat the acquisition as an unauthorized acquisition for the purpose of determining the appropriate response.</p>	<p>YES</p>
<p>21. All services shall be performed in the United States.</p>	<p>YES</p>

B. Medical Transcription Services (SOW A.2.)

Medical Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
<p>22. The Contractor must provide medical transcription services, and otherwise do all things necessary for or incidental to the performance of work as set forth below.</p>	<p>YES</p>
<p>23. The format shall be specified by the participating entity.</p>	<p>YES</p>

Medical Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
24. <i>The SFTP or equivalent site used to transmit transcriptions must conform to current laws in the participating state and federal privacy laws including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and its regulations at 45 Code of Federal Regulations (CFR) Parts 160 and 164; and the Confidentiality of Alcohol and Substance Abuse Patient Records as regulated at 42 CFR Part 2.</i>	YES
25. <i>The Contractor shall destroy medical transcriptions in compliance with the Participating State’s laws and federal privacy laws related to the destruction of protected health information (PHI) and other data.</i>	YES
26. <i>The Contractor shall not duplicate, share, disclose, use, or disseminate PHI or other data it receives and transcribes, with any third party, without written permission of the participating entity.</i>	YES
27. <i>The Contractor shall require its employees and agents to report any suspected unauthorized use or disclosure of PHI or other data as soon as becoming aware.</i>	YES
28. <i>The transcriptionists must be familiar with medical terminology and would preferably have transcriptionists that are certified medical transcriptionists. At minimum, transcriptionists need to have thorough knowledge of healthcare terminology including abbreviations, anatomy and medications.</i>	YES
29. <i>All transcribed documents should meet Joint Commission on Accreditation of Healthcare Organizations (JCAHO) and Association for Healthcare Documentation Integrity (AHDI) industry standards.</i>	YES

C. Legal Transcription Services (SOW A.3.)

Legal Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
30. <i>The Contractor shall provide written transcription for all audible portions of digitally recorded legal proceedings and quasi-legal proceedings, such as administrative hearings. The Contractor shall meet the participating state’s requirements for all written documents.</i>	YES

D. Optional Transcription Services (SOW A.4.)

Legal Transcription Services Requirements	
Requirement Description and Exceptions	Vendor Asserts Full Capability and Compliance
31. <i>If the Contractor provides optional transcription services, such as braille or insurance services the participating entity may provide a written request for these services to the Contractor.</i>	YES

Marketing of the NASPO ValuePoint Master Agreement (4.5.5)

A. Promotion of Master Agreement (Marketing a.)

Bureau sales and marketing staff will contact participating NAPSO Valuepoint Master Agreement participating agencies and states. We will acknowledge our inclusion in all bid types that may be posted or upcoming. Sales and marketing via bids, contacts and existing customers will be an important tool utilized by our organization to gain access to business through an existing network and infrastructure.

B. CPO Permission Integration (Marketing b.)

Integration will be coordinated between a state procurement official (CPO) and our organization on a multi-level agenda. Upon CPO permission to market the Master Agreement contacts, both existing and new will be provided a complete scope of services available through the Master Agreement with a verified CPO as reference. This will help assure that the Bureau of Office Services is a true source within the scope of a state organization's search for services that we provide.

C. Scope Clarification (Marketing c.)

All scope issues will be individually addressed and all questions will be answered with verifiable documentation, facts and statistics not with marketing jargon or sales pitch rhetoric.

D. Fee Due Date Management (Marketing d.)

Due dates for payments will be scheduled and kept in our automated accounts payable system. Payments will be processed either via automated ACH or mailed 5 business days before the due date. Usage reports will be programmed to generate on a fixed schedule as specified using our fully automated payables and charge module that is directly tied to our production platform. All data will be client specific and fully detailed excluding any HIPAA protected health information, SSN's or other confidentiality excluded material.

E. Opportunities and Challenges (Marketing e.)

The Bureau envisions a new avenue for providing our 59-year-old, established organization with a new sales and marketing channel. This will enhance our business and provide participating states and with a stable solution to their workflow needs.

The most common challenges are likely to include initial communication and understanding of needs and solutions. This is common and remedied continued clarification by the parties involved. The Bureau has decades of experience both listening, clarifying and structuring customer solutions in written form and both educating and assuring potential customers precisely what we offer in response to their detailed needs.

