Sample Statement of Work
(Simple)

Volume Overview:

Per client: We have 30 boxes of files plus two 4 drawer lateral cabinets and 1 four drawer vertical cabinet. Documents sit in file folders with a first and last name on them.

Define your scan volume.

Description	Units	Unit of Measurement
Drawers - Lateral Cabinets	8	Drawers / Shelves
Total Inches Per Drawer	36	Inches
Total Boxes - Lateral Cabinets	**19**	**Boxes**
File Drawers - Vertical Cabinets	4	Drawers / Shelves
Total Inches Per Drawer	20	Inches
Total Boxes - Vertical Cabinets	**5**	**Boxes**
Total Existing Boxes of Files	**30**	**Boxes**
Total Boxes In Project	**55**	**Boxes**
Estimated GB	7.80	GB

Observations and Comments

Some of the files have driver's licenses. After discussion with the client, we shall use 300dpi resolution which may result in a lower quality image for some of the licenses. As long as the license number is preserved along with a name and DOB. The pick up is on the 3rd floor of the building. There is a service elevator.

Scanning Scope of Work and Fees: $X,XXX.XX

| Level of Service	Fee Per Unit	Units	Project Fee
Pick up via ImageFreeway - Boxes	$XXX.XX	55	X,XXX.XX

Define the service level of your project. Whose packing, transportation, quality, file naming etc.

1. Packing, Pick up and transportation of up to 55 standard sized bankers boxes
   - An industry standard bankers box measures (10"H X 12"W X 15"L)
   - Larger boxes shall be charged a fee commensurate with the box cube.
2. Transportation to an ImageFreeway scan center.
3. Document Prep (removal of staples, paper clips etc.).
4. Create a B&W 300dpi, text searchable PDF.
5. Includes all standard paper sizes statement up to ledger (11" x 17").
6. Indexing: Choose either option, in advance of processing. Custom indexing works best if the files are going into a 3rd party software application like ImageFreeway / OnBase / FileNet / SharePoint.
   - Custom Indexing: Includes up to 3 index fields
     - Example: Last Name | First Name | Category
     - Example: Matton_Michael_Correspondence.pdf
   - Includes up to 40 folders per box and 3 index fields per folder, 120 total index fields per box.
   - Excess index fields billed at a rate of $0.10 per field.
   - Excess folders billed at a rate of $0.15 per folder.
7. Quality Control: Standard ANSI/27001 document scanning quality control objectives are utilized under HIPAA guidelines.
8. Documents delivered to client via secure thumb drive.
9. Documents are shredded at the end of the retention period (90 days from receipt of files).
10. You will only be billed for the actual number of boxes received.

Indexing Overview

Capture the index field off the folder, either from the white label or folder tab. Use a client supplied file listing in a match and extract process to ensure data accuracy. Add 3 fields from the data table in addition to the first and last names of the individual.

Indexing Instructions: Client Files
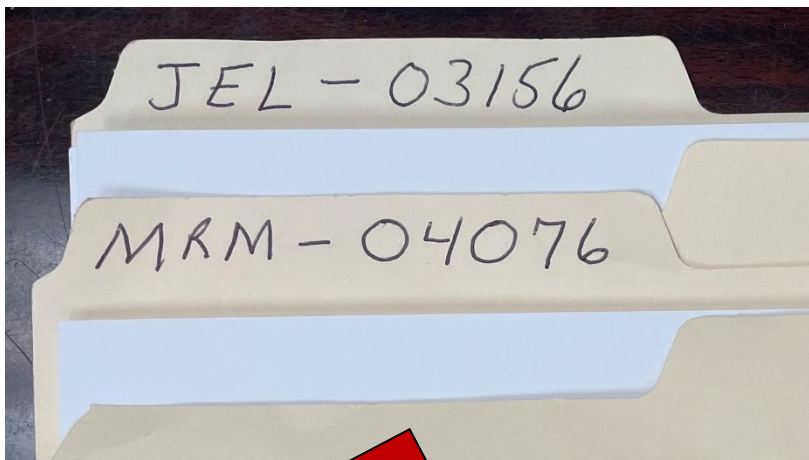
A couple of pictures using your phone goes a long way to ensuring everyone understands your file naming requirements.

For client Files Please create two index fields. One for a 3 character set of letters and then one that contains up to a 6 digit number.

Double check your files. You'll need to provide your vendor with instructions as to which pieces of data you want used to name the files. Itemize jobs separately.

Indexing Instructions: MSDS Files

For MSDS files pull the pull the following index fields…

Revison Date:
Product Name:
Product Number:
Supplier Name:

Authorization

Client Authorized Signature: _____

Name: _____

Title: _____

Date: _____

ImageFreeway Authorized Signature: _____

Name: _____

Title: _____

Date: _____

Make sure you request a copy of your vendor's terms and conditions. Many vendors write their contracts so that you get billed for overages.

Signature signifies acceptance of the terms and conditions listed on S~~~~~~~
Any changes to the scope of work (above) need to be approved in writing by the client an~~~~~

Schedule 1: Terms and Conditions

1. **Payment Terms:** Quoted prices assume a 50% payment in advance, balance due upon receipt of product.

2. **Boxes:** ImageFreeway will provide pick-up of packed boxes from Client location to an ImageFreeway scan center. Quote is based upon a standard size file box (10"x12"x15").

3. **Document Scanning:** Scan-able documents will be scanned at their native size in duplex mode to ensure that the front and back of all documents will be captured. An image is defined as each side of a sheet of paper. Blank pages shall not be removed from the document. Turnaround time shall be 6 weeks from receipt of boxes unless otherwise noted in the Scope of Work section of this order.

4. **File Naming:** The document contents of each file folder will be scanned and converted into one (1) text-searchable .PDF file and named using the first 50 characters found on the file folder tab unless otherwise noted in the Scope of Work section of this order. Optional custom naming or indexing of documents, post pick up, may be subject to overage fees.

5. **Image Review & Document Destruction or Return:** All scanned documents will be provided back to the client on a thumb drive. Client will have thirty (30) days to inspect document images and authorize destruction and /or return of boxes and original paper content. Failure by Client to authorize destruction of boxes prior to the end of the Image Review Period will result in a charge to the Client of $3.00 per box per month for monthly storage until such authorization is provided by Client.

6. **Overage Charges:** Document scanning overage charges will be billed to the Client, in arrears, for items such as documents that are larger than 11" x 17", any documents that require custom naming or indexing outside of the SOW, as specified by the Client in writing and any document that requires hand placement on scanner. A hand placement includes but is not limited to non-auto-feedable items such as receipts, folders, envelopes, 3D objects. A hand placement may not have text searchable attributes.

7. **ImageFreeway Software Fee's:** Software fee's, are billed as a separate line item. Unless Client's quote contains a separate software line item with a price software is not included in any scanning project.

8. **ImageFreeway Storage Fee's:** Storage fee's, are billed as a separate line item. Unless Client's quote contains a separate document storage line item with a price document storage is not included in any scanning project.

9. **Countersignature:** Proposal not valid without ImageFreeway and Client signature.

Sample Statement of Work
With Site Review
(Detailed – For review by committee's)

Volume Overview:

Per client: We are looking for a solution to our paper problem. We'd like to have our records scanned and invest in a document management platform that will help move us towards becoming paperless. For scanning we have the following boxes of paper that will need to be kept permanently…

File Type	Volume	Unit of Measure
Special Education Files	168	Standard Bankers Box
Gifted and Talented Files	50	Standard Bankers Box
Graduate Student Records	85	Standard Bankers Box
Inactive Student Records	180	Standard Bankers Box
Total Volume	**483**	Standard Bankers Box

Description	Units	Units
Total Boxes	483	Boxes
Box Size (length)	15	Inches
Estimated Total Sheets of Paper	1,449,000	Sheets
Estimated Images (20% double Sided)	1,738,800	Total Images
Estimated Size of 1 Image	50	KB
Estimated KB	86,940,000	KB
Estimated GB	82.91	GB

Observations and Comments

We assume the documents sit in file folders/redwelds and the folders/redwelds contain the information necessary to name the files. Money can be save using a match and extract process with a county supplied database.

Scanning Scope of Work and Fees:

Level of Service	Fee Per Box	Boxes	Project Fee
Pick up by ImageFreeway Employee	$XXX.XX	483	$XX,XXX.XX

1. Includes onsite packing, manifesting, pick up and transportation by ImageFreeway.
   - An industry standard bankers box measures (10"H X 12"W X 15"L).
   - Larger boxes shall be charged a fee commensurate with the box cube.
2. Transportation to an ImageFreeway scan center.
3. Document Prep (removal of staples, paper clips etc.).
4. Create a B&W 300dpi, text searchable PDF.
5. Includes all standard paper sizes statement up to ledger (11" x 17").
6. Indexing: Choose either option, in advance of processing. Custom indexing works best if the files are going into a 3rd party software application like ImageFreeway / OnBase / FileNet / SharePoint.
   - Custom Indexing: First Name / Last Name / Student ID / Last 4 Social / File Type
     - Example: Matton_Michael_456987_0000_Gifted.pdf
   - Includes up to 75 file folders per box, 36,225 total files and 181,125 total index fields
   - Excess index fields are billed in arrears at a rate of $0.04 per index.
   - Excess folders are billed in arrears at a rate of $0.15 per folder.
7. Quality Control: Standard ANSI/27001 document scanning quality control objectives are utilized under HIPAA guidelines.
8. Documents delivered to client via secure thumb drive.
9. Documents are shredded at the end of the retention period (30 days from receipt of files).

A Web Based Solution to Eliminate Paper – Storage Platform

Document Management Software Scope of Work and Fees

Service Description	Units	Overage	Billing Metric
Number of Full Users	10	xxx.xx	per user per month
Number of View Only Users	0	xxx.xx	per user per month
eSignature - internal users	0	xxx.xx	per user per month
Storage in GB	84	xxx.xx	per GB per month
eSignature (external fee)	Unlimited	xxx.xx	per envelope
eForms	Unlimited	xxx.xx	
Training	2	xxx.xx	
Professional Services	10	xxx.xx	
Mail Processing	0	Priced based on vo...
Invoice Processing	0	Priced based on volume / ...
Data Extraction	0	Priced based on volume / data e...
INITIAL AND ONGOING FEES			
Annual Platform Fee		xxx.xx	Annual in Advance
Monthly Storage Fee		xxx.xx	Based on site size in GB
Total Monthly Fee		xxx.xx	**Monthly**
One Time Implementation Fee		xxx.xx	**One Time (1/3 - 1/3 - 1/3)**

*Implementation fee billed in thirds over first 3 months.

In this program we're taking the entire school system PAPERLESS. This includes a student portal, workflows and unlimited training.

Combined Project Fee

Upfront Fees			
Level of Service	Fee Per Box	Units	Project Fee
Pick up by ImageFreeway Employee	xxx.xx	483	xxx.xx
ImageFreeway Subscription	xxx.xx	1	xxx.xx
Implementation Fee	xxx.xx	1	xxx.xx
	Total Upfront Cost		xxx.xx

This is a sample of a project fee for software and scanning. A complete paperless program!

Recurring Fees	
Recurring Monthly Fee - Data Storage	xxx.xx
Recurring Annual Fee - ImageFreeway Platform	xxx.xx

Software Features

Features Included
Bar Code Recognition
Bulk PDF creation
Capture Profiles
Drag and Drop
eForms platform
eForms Tools
eSignature platform
Inbound Email Accounts
Notes, Annotations, Audit Trail
One Touch Search
Scan App - document editing at ingestion
Scan App - match and extract database integration
Scan App - point and click data extraction
Scan App - Scan to folder via MFP
Search - index, file name, content
Searchable PDF/OCR conversion tool
Secure Email
Unlimited index fields
Unlimited departments
Unlimited users (user fee applies)
Version control - document locking, version saving

IT Services & Security
Dual server platform with daily data back-ups
Geographic Redundancy - Separate electric and data feed grids (east /west coast)
Certified SOC 2	FedRAMP	ISO	NIST	CSFC	FIPS 140-2	HIPAA
Hardened Data Centers with power back up and 24/7 security

- There are no exit fees or cancellation fees
- A one-time bulk export file of all files is available to the client on demand free of charge
    - File shall be delivered via encrypted hard drive
- After the 24-month initial term, this agreement is cancellable at any time with a 60-day notification.
    - Conditional upon all invoices being current and paid in full
- It is agreed that the client shall only be billed for scanning at the proposed rate for the number of boxes scanned. A reduction in the scanning shall show a reduction in the final fee billed.
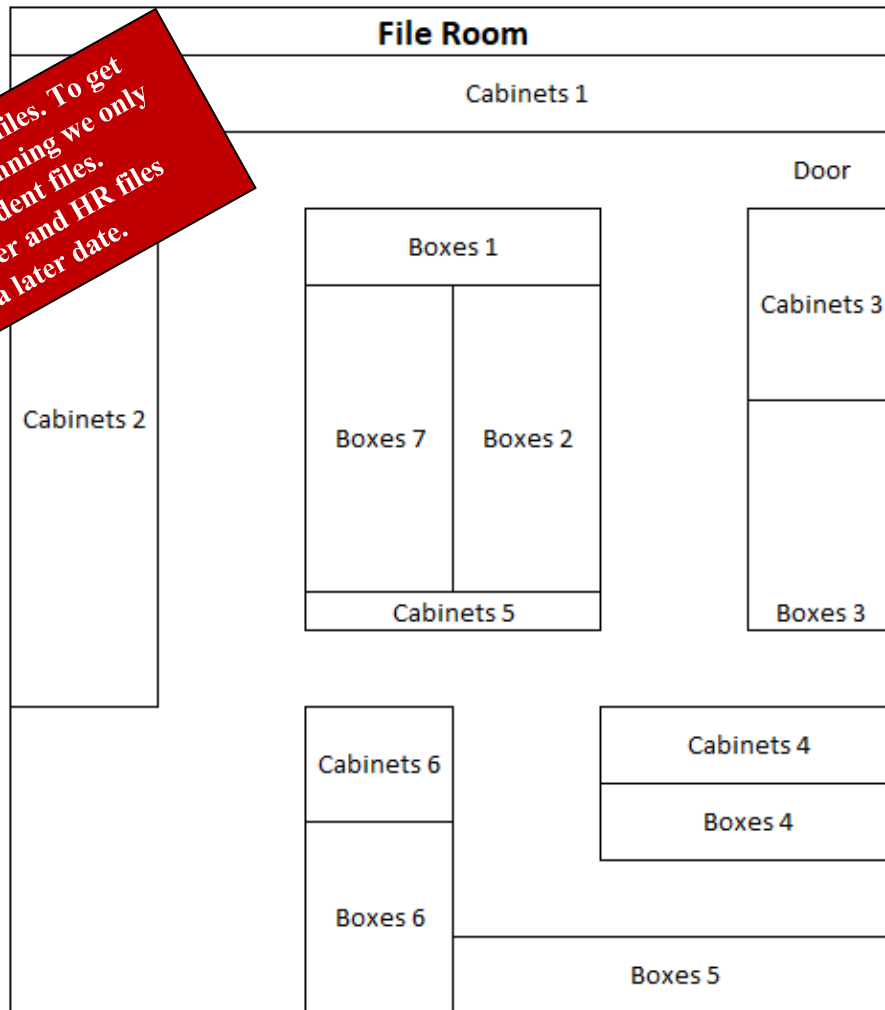
Implementation Services

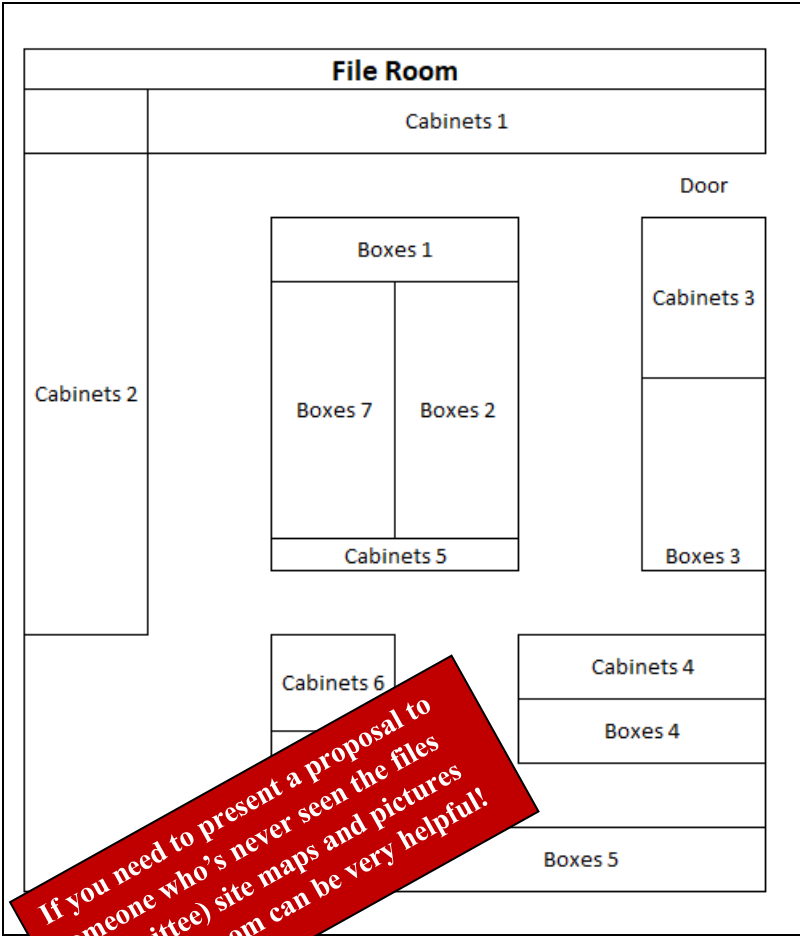| Implementation Services |
| --- |
| **Site set up** |
| Creation of customized departments, projects, index |
| Set up of capture profiles |
| Set up of one touch keys |
| Set up and testing of user accounts |
| Import of files scanned by ImageFreeway |
| Import of all data associated with those files |
| Set up and testing of departmental scan profiles |
| **Training - Customized** |
| Webinar training for your users - total 2 hours can be spread over different sessions |
| Customized training video for your student files |
| **Workflow development - determine validity of "Going Paperless"** |
| Identify departments that might find value in digital workflows |
| Identify ROI of outsourced mail program |
| Identify ROI of outsourced data extraction program |
| **Project Management** |
| Unlimited PM meetings |
| Provide PM oversight to student records project |
| **Site Visits** |
| Up to 3 site visits for one full day |
| ImageFreeway covers all travel costs |
| Includes 8 hour of work time - can be spread over 2 days per visit |

You should define the work you're software vendor will be providing to ensure that all personnel adopt the platform.

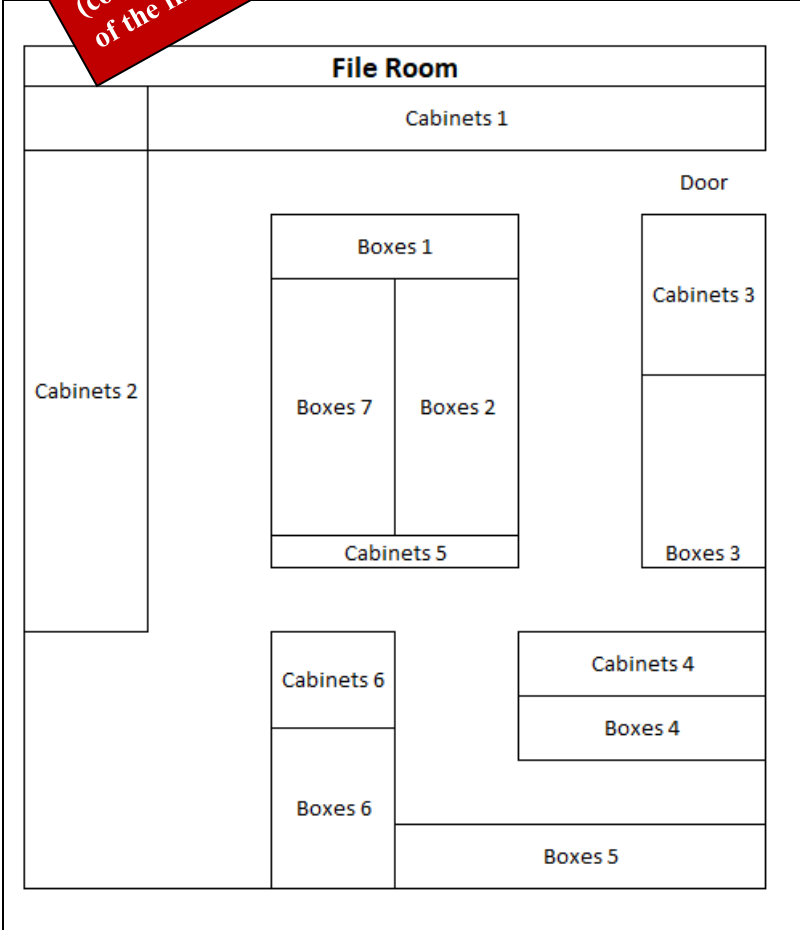# Appendix 2 – Site Review – Volume Summary

File Room

Cabinets 1

Door

The site map totals all files. To get the system up and running we only need to scan the student files. Accounting, teacher and HR files can be added at a later date.
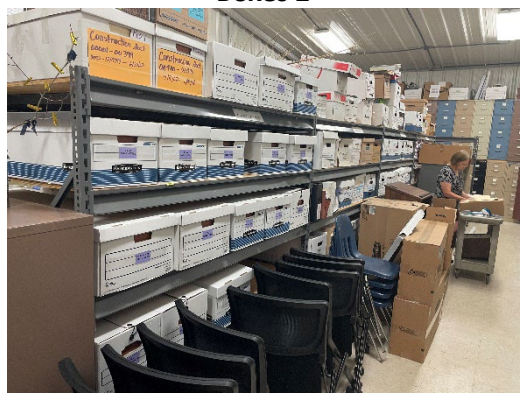
Cabinets 2

Boxes 1

Cabinets 3

Boxes 7 | Boxes 2

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 6

Boxes 5

FILE VOLUME MEASURED IN STANDARD BOXES					
Type	Map #	Drawers	Size	Total	Boxes
Cabinets	1	81	24	1944	129.6
Cabinets	2	88	24	2112	140.8
Cabinets	3	201	24	4824	321.6
Cabinets	4	16	24	384	25.6
Cabinets	5	8	24	192	12.8
Cabinets	6	12	24	288	19.2
Boxes	1	NA	NA	NA	17
Boxes	2	NA	NA	NA	63
Boxes	3	NA	NA	NA	56
Boxes	4	NA	NA	NA	21
Boxes	5	NA	NA	NA	25
Boxes	6	NA	NA	NA	48
Boxes	7	NA	NA	NA	72
Fingerprint	NA	16	24	384	72
Everything in the room					1023.6

File Room

Cabinets 1

Door

Cabinets 2

Boxes 1

Cabinets 3

Boxes 7 | Boxes 2

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 5

If you need to present a proposal to someone who's never seen the files (committee) site maps and pictures of the file room can be very helpful!
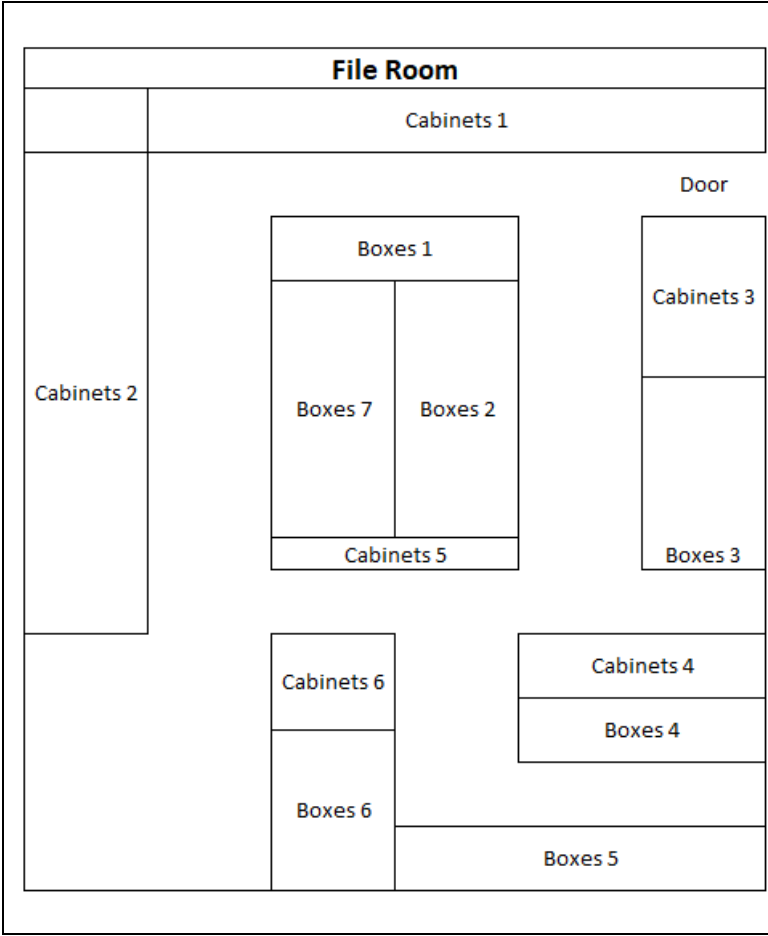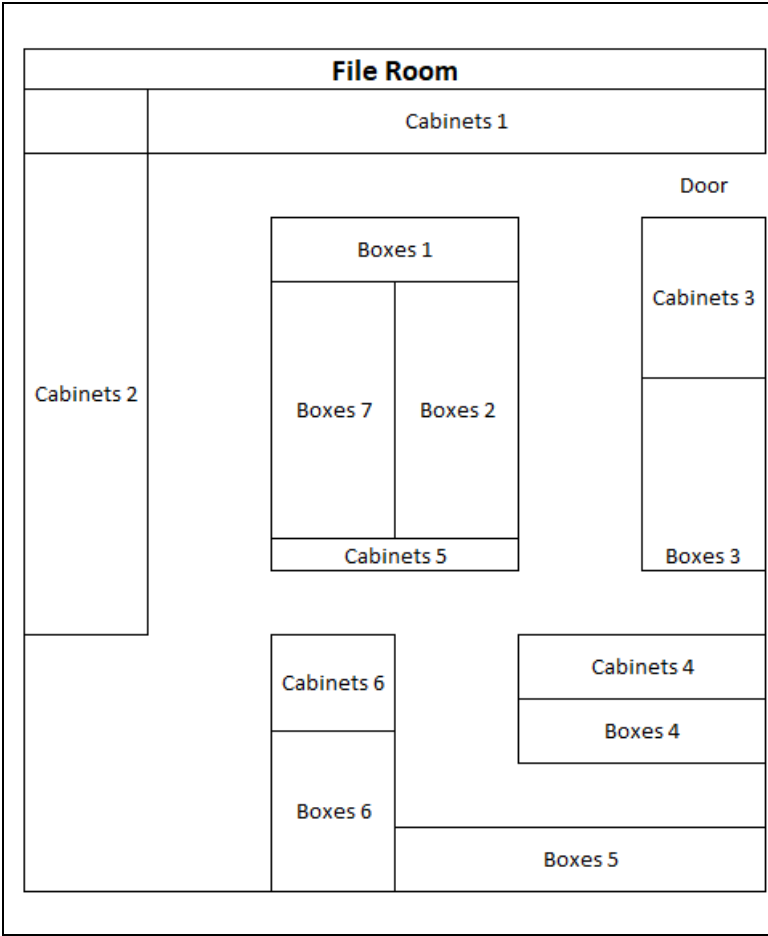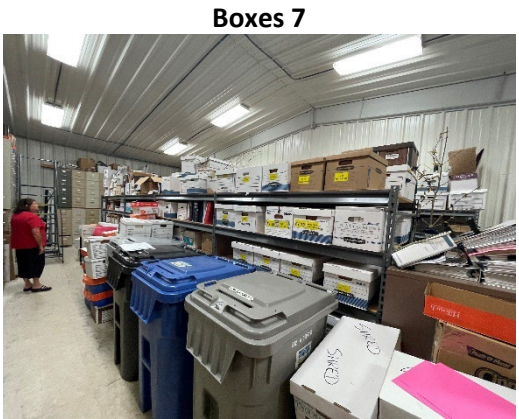
Cabinets 1 & Boxes 1

Boxes 2

File Room

Cabinets 1

Door

Cabinets 2

Boxes 1

Cabinets 3

Boxes 7 | Boxes 2

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 6

Boxes 5

Cabinets 3 & Boxes 3

Boxes 2

File Room

	Cabinets 1
Cabinets 2	Door

Boxes 1

Boxes 7 | Boxes 2

Cabinets 3

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 6

Boxes 5

Cabinets 4

Cabinets 5 & 6

File Room

	Cabinets 1
Cabinets 2	Door

Boxes 1

Boxes 7 | Boxes 2

Cabinets 3

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 6

Boxes 5

Boxes 4

Boxes 5

File Room

	Cabinets 1

Cabinets 2

Boxes 1

Cabinets 3

Door

Boxes 7 | Boxes 2

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 6

Boxes 5

Boxes 6

File Room

	Cabinets 1

Cabinets 2

Boxes 1

Cabinets 3

Door

Boxes 7 | Boxes 2

Cabinets 5

Boxes 3

Cabinets 6

Cabinets 4

Boxes 4

Boxes 6

Boxes 5

Boxes 7

Boxes 7-A

File Room

	Cabinets 1

Door

Cabinets 2

Boxes 1

Boxes 7 | Boxes 2

Cabinets 5

Cabinets 3

Boxes 3

Cabinets 6
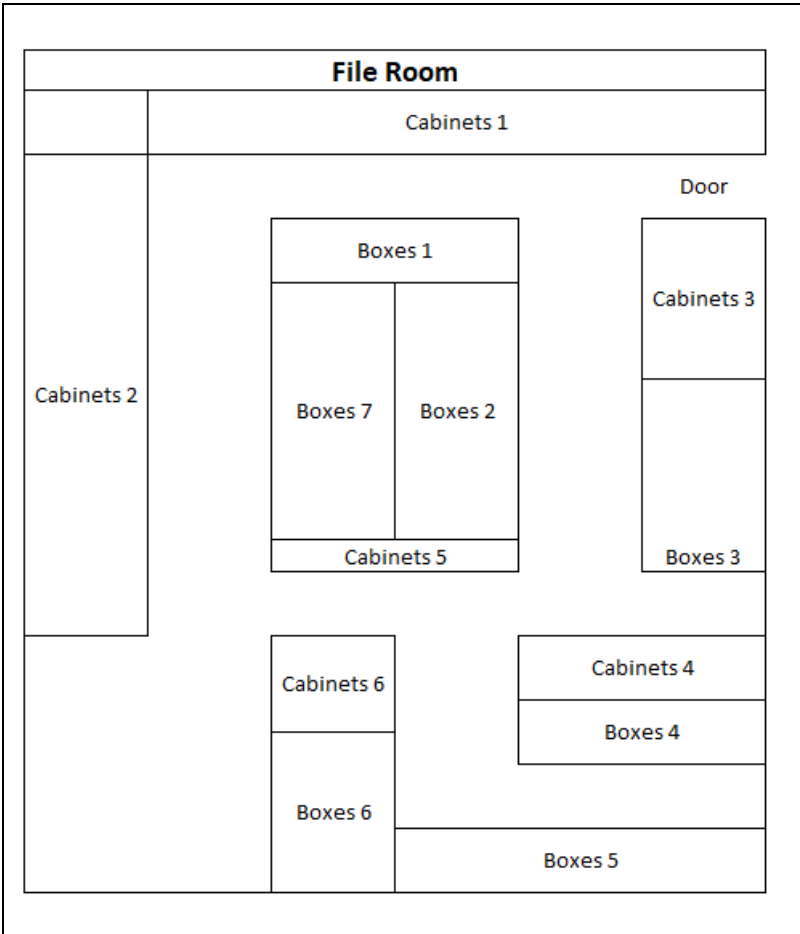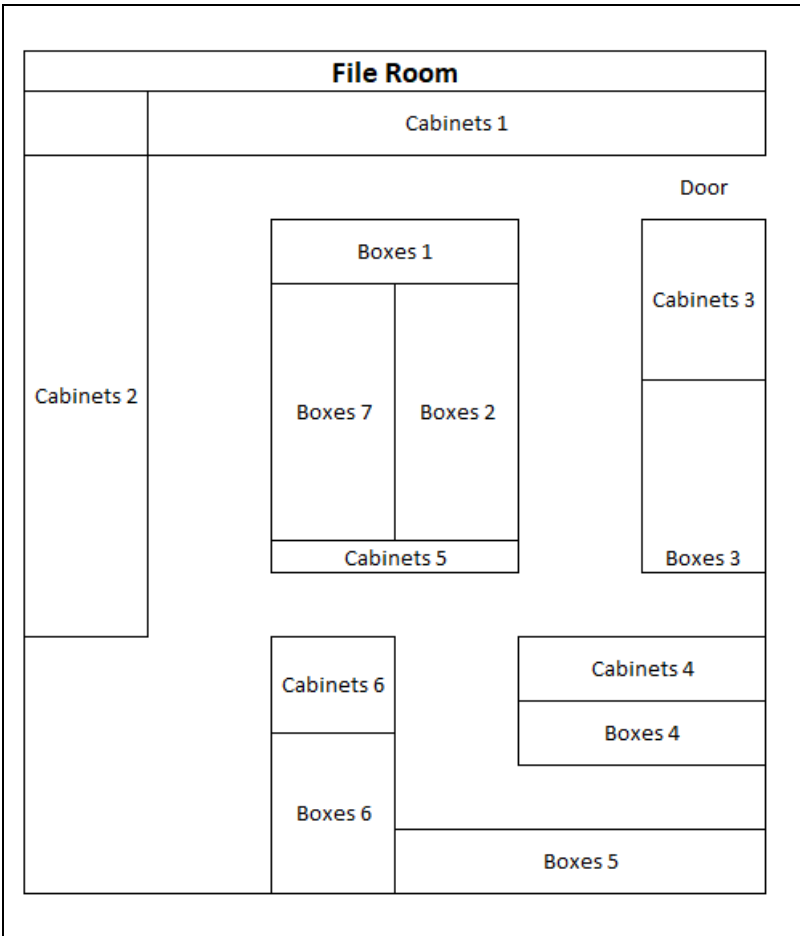
Cabinets 4

Boxes 4

Boxes 6
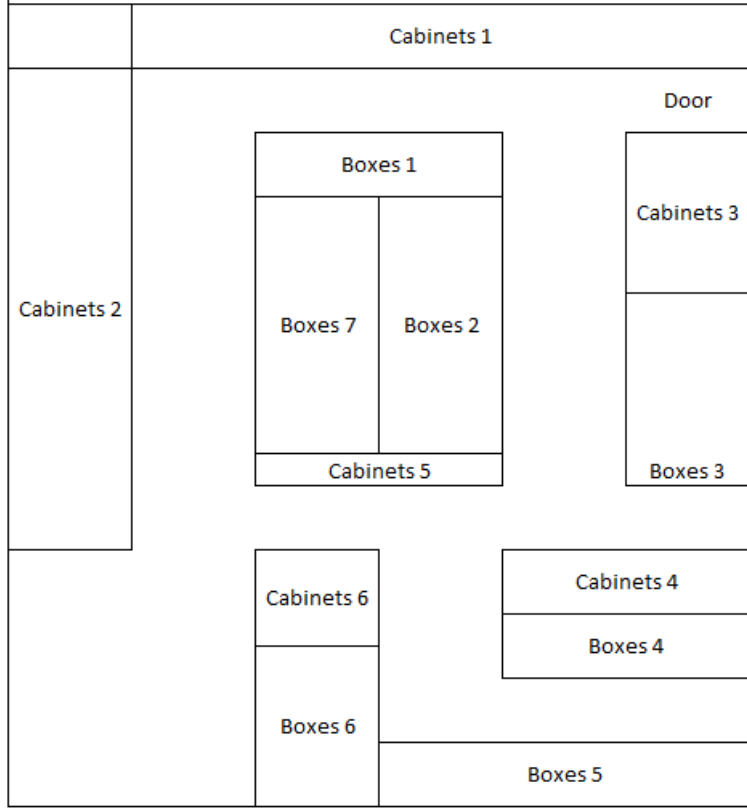
Boxes 5

Cabinets 2

Appendix 3 – Paper Less Program
Future State

The pricing in this overview does not provide the services to take the entire county school district paperless. To accomplish this task you'll need to incorporate practices and technologies that reach out to all the different components of the school district with which the county does business. The platform provides you with ALL the tools you need to accomplish this goal. Our company provides you with all the services you need to accomplish this goal.

What makes ImageFreeway different is our pricing. With our Paperless program (you're investing in our storage program) you don't need to figure out how many users will be accessing the site at one time. You'll have one flat fee within which you'll be able to use all our features to successfully take the district paperless. **This approach provides you with tremendous value.**

Below is a summary of the estimated number of people who would be accessing the site in some way, shape or fashion along a comparison of what it would cost the county to transition from a Storage Platform to a Papeless Platform.

County School District User Base

Client User Base	
User	Volume
Students	3400
Teachers	240
Admin - Support	280
Vendors	400
Parents (Included with students)	0
Total Users	4320
Facilities	10

Estimated Costs ImageFreeway Paperless Program (Future State)

Service Description	Units	Overage	Billing Metric
Number of Full Users	50		per user per month
Number of View Only Users	0	$X.XX	per user per month
eSignature - internal users	3870	$X.XX	per user per month
Storage in GB	500	$X.XX	per GB per month
eSignature (external fee)	0	$X.XX	per envelope
eForms	unlimited	Included	NA
Training	80	$XXX.XX	Hours
Professional Services	110	$XXX.XX	Hours
Mail Processing	0	Priced based on volume / data extracted	
Invoice Processing	0	Priced based on volume / data extracted	
Data Extraction	0	Priced based on volume / data extracted	
FEES			
Monthly User Fee		$XXX.XX	
Monthly Storage Fee		$XXX.XX	
Total Monthly Fee		**$XXX.XX**	**Per month**
One Time Implementation Fee		**TBD**	**1/3 1/3 1/3**

Appendix 3 – Indexing Requirements Per Department

File Type	Volume	Unit of Measure
Special Education Files	168	Standard Bankers Box
Gifted and Talented Files	50	Standard Bankers Box
Graduate Student Records	85	Standard Bankers Box
Inactive Student Records	180	Standard Bankers Box
Total Volume	**483**	Standard Bankers Box

For all active files vendor shall split the files into their component parts outlined in the Document Types chart listed below. The county requires the following naming convention…

Jobs 1 – 3: All files other than Inactive Student Records

Last Name_First Name_StudentID_Status_DocType
Example: Matton_Mike_21498_Active_Birth Certificate.pdf

Job 4: Inactive Student Records – Scan all records as one file/.pdf.

Last Name_First Name_StudentID_Graduation Date_DocType
Example: Matton_Mike_21498_05-28-2012.pdf
Use the supplied .csv file (see below) to cross check results against our database and provide a list of "missing" files.

Document Types - Student
Birth Certificate
Correspondence
Discipline
Immunization Record
Other
Parent Correspondence
Performance Review
Transcripts

COUNTY SUPPLIED DATABASE

Last Name	First Name	ID	DOG
Jones	Matthew	06-1425	1957
Matton	Karen	06-3265	1985
Chambers	Darren	06-4523	2000
Smith	Susan	05-9863	2018

VENDOR SHALL EXPORT THE FILES INTO THE DOCUMENT MANAGEMENT

Search Results for Records(4 Documents)

Batch Print / Email   Batch Index   View Multiple Docs   Start a new search

Select All	View Doc	Edit Index	LName	FName	ID	DOC	School_Name	DOG
☐			Jones	Matthew	06-1425	BC	Coosa	1957
☐			Matton	Karen	06-3265	ImmCard	Armuchee	1985
☐			Chambers	Darren	06-4523	BC	Pepperell	2000
☐			Smith	Steven	05-9863	Transcript	Model	2018