



eceptionist®

Eceptionist Response RFP 2023-005

Webb County Public Health Services | January 10, 2023

Eceptionist Inc.
405 Main Street, Suite 800A
Houston, TX 77002
www.eceptionist.com

Primary Contact:
Dawniela.Hightower@eceptionist.com

TRANSMITTAL LETTER

Supplier Information

Company Name: Eceptionist, Inc.

Contact Name: Dawniela Hightower

Address: 405 Main Street , Suite 800A
Houston, Texas 77002

Phone: 713.520.6688

Fax: 713.520.6785

Email: Dawniela.Hightower@eceptionist.com

Supplier Notes

Contractual Contact is Dirk Voorhees,
Dirk.Voorhees@eceptionist.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Dirk Voorhees

Print Name



Signature

EXECUTIVE SUMMARY

Eceptionist is recommending its VaxManagerCX solution to Webb County for providing online scheduling of vaccines for children and adults, flu vaccines, COVID-19 vaccines, and TB Testing.

VaxManagerCX™ is a web-based appointment scheduling solution that is easy-to-use and implement and is mobile-friendly. It allows healthcare organizations to maximize access around vaccination efforts with flexible appointment calendar functionality that allows for both consumers and staff to manage and schedule all types of appointments. VaxManagerCX provides intelligent scheduling and facilitates self-service patient screen screening while helping to track patient check-ins and no-shows with extensive reporting and easy-to-use-dashboard.

VaxManagerCX™ provides vital information and serves as a data input and reporting hub for public health organizations and vaccinators looking to efficiently manage the vaccination process and decrease incoming call volume and includes the following features:

- **Online Scheduling:** Web-based clinical scheduling and calendar management
- **Automated Triage & Screen Screening:** Response based questions and intelligent patient screening integrated into the scheduling workflow
- **Patient Self-Service:** Patient self-registration for scheduling and management appointments, check-in and requests
- **Control Patient Flow:** Align schedule to resources, patient check-in management, and manage resources with appointment availability
- **Appointment Reminders & Follow Up:** Reduce no-shows with patient reminders, track and remind patients who need to return for subsequent doses, send post-vaccine surveys
- **Maximize resource capacity** by reducing administrative burden, using intelligent scheduling and automating processes where possible
- **Dashboards and Reports:** Vaccinators can easily monitor and track activity, # of appointments on a given day/week, performance metrics, etc.

Eceptionist's experience meets WCPHS requirements as stated:

- 20 years' experience working with healthcare organizations around the globe to provide web-based appointment scheduling systems
- Experience with public and government organizations
- Experience working with organizations that serve a mostly disadvantaged population comprised largely of uninsured and Medicaid/Medicare recipients
- Experience configuring scheduling systems to meet the unique needs of organizational scheduling needs
- Experience integrating with third-party systems as well as providing software as a standalone solution

As required in the RFP, we have included as part of the executive summary our offeror's statement:

This offer response is being provided by:

Eceptionist, Inc. a corporation located in Houston, Texas at the following address:

Eceptionist Inc.
405 Main Street, Suite 800A
Houston, Texas 77002

Contractual Contact:

Dirk Voorhees, Principal & Chief of Produce Development
405 Main Street, Suite 800A
Houston, Texas 77002
(O) 713.520.6704; (F) 713.520.6785

Key Project Staff:

All key vendor staff have primary business locations at the Houston headquarters including the following staff members:

- Dawniela Hightower, Director of Implementation & Customer Success
- Patrick Chen, Chief Architect and Engineer
- June Zhou, Sr. Technical Engineer

Statement of Financial Reliability:

Eceptionist was founded in 1999 and maintains a strong financial position with double digit growth on an annual basis over the last ten years. We can confidently assure WCPHS that Eceptionist's financial health is strong. Our company has been implementing software and supporting customers around the globe for the last 20 years. (Eceptionist is a privately held company and it has been the decision of the Board of Directors to not release financials to the public.)

Table of Contents

- Experience with Web Based Appointment Scheduling Software 5
 - CORPORATE INFORMATION 5
 - SIMILAR PROJECTS 5
 - SCOPE OF SERVICES: FUNCTIONAL & TECHNICAL REQUIREMENTS 6
- Personnel Qualifications..... 10
 - PROJECT TEAM 10
 - KEY PERSONNEL 10
 - ECEPTIONIST ADVANTAGE & ADDITIONAL FEATURES 11
- References and Projects..... 13
- Convenience of Navigation Tools and Real Time Information 17
- Other Information & Benefits 18
 - Project Timeline 18
 - Training Methodology & Services 18
- Pricing Proposal..... 20
- Addendum 23
 - Mobile Screenshots 23
 - Vail Health Case Study 23

Experience with Web Based Appointment Scheduling Software

▪ CORPORATE INFORMATION

Eceptionist, Inc. (www.eceptionist.com) is a leading provider of software solutions for the health care industry providing cloud-based applications that support healthcare organizations ability to coordinate care and manage the healthcare delivery process across sites, regions and countries. Eceptionist is a US based company with headquarters in Houston Texas. Since 2001, we have been helping clients reduce costs and optimize the delivery of healthcare services. Our offerings include the following solutions: VaxManagerCX, SchedulingCX, ReferralCX, eConsultCX, ConsumerCX and WorkflowCX. These solutions can be implemented independently as a stand-alone platform or seamlessly together as a complete suite of applications. Our global client portfolio includes regional and statewide health systems, university medical centers, multiple trusts within the National Health Service in the UK and Ireland, provincial health services within most Canadian provinces and previous projects in Australia.

Eceptionist's first installation of a web-based scheduling solution occurred in 2001. Since organization around the globe have been utilizing the Eceptionist scheduling solutions to schedule all types of patient appointments including but not limited to specialty appointments, virtual appointments, primary care, lab/test, infusion treatment, diagnostic and vaccine appointments. Tens of millions of patient appointments have been scheduled using Eceptionist solutions over the last 20 years.

▪ SIMILAR PROJECTS

Eceptionist's global client base consists primarily of large public healthcare delivery systems, university medical centers, provincial and government healthcare entities, accountable care organizations (ACO), and payors. Specific organizations with which Eceptionist has partnered to deploy off-the-shelf and custom applications include Vail Health System in Colorado, Children's Hospital of Orange County, Dana Farber Cancer Institute, Baylor St. Luke in Texas, and multiple Provincial Health Systems in Canada. These projects included work with hospitals, clinics, physician groups, and other healthcare delivery systems.

Eceptionist worked with Vail Health in 2020 to rapidly deploy a Covid-19 test and scheduling solution during the height of the pandemic. This project involved deploying a patient self-scheduling portal with integration into Vail's various clinical systems; Eceptionist's integration experience and history developing scheduling portals was the key differentiator. A Case Study describing this deployment has been included in the Addendum of this proposal.

A sample of customers that have implemented Eceptionist's appointment scheduling solutions include:

CUSTOMER	PROJECT TIME FRAME
Baylor St. Luke Medical Center, Texas	2018 – Present
Vail Health, Colorado	2020 - Present
Louisiana Department of Corrections, Louisiana	2013 - Present
Dana Farber Cancer Institute, Massachusetts	2017 - Present
Alberta Health System, Canada	2018 - Present
Manitoba Telehealth, Canada	2008 - Present
Dubuque County, Iowa	2020 – 2021 (Temporary COVID-19 response)
Access Health, Louisiana	2020 – 2021 (Temporary COVID-19 response)

▪ SCOPE OF SERVICES: FUNCTIONAL & TECHNICAL REQUIREMENTS

Eceptionist's VaxManagerCX solution exceeds the requirements outlined in the WCPHS Request for Proposal to provide Webb County residents with convenient access to schedule appointments remotely for a variety of vaccines and other health related services. Details of how VaxManagerCX meets the requirements is described below:

- **Capability to provide online scheduling services for vaccines for children, vaccines for adults, flu vaccines, COVID-19 vaccines, and TB testing**

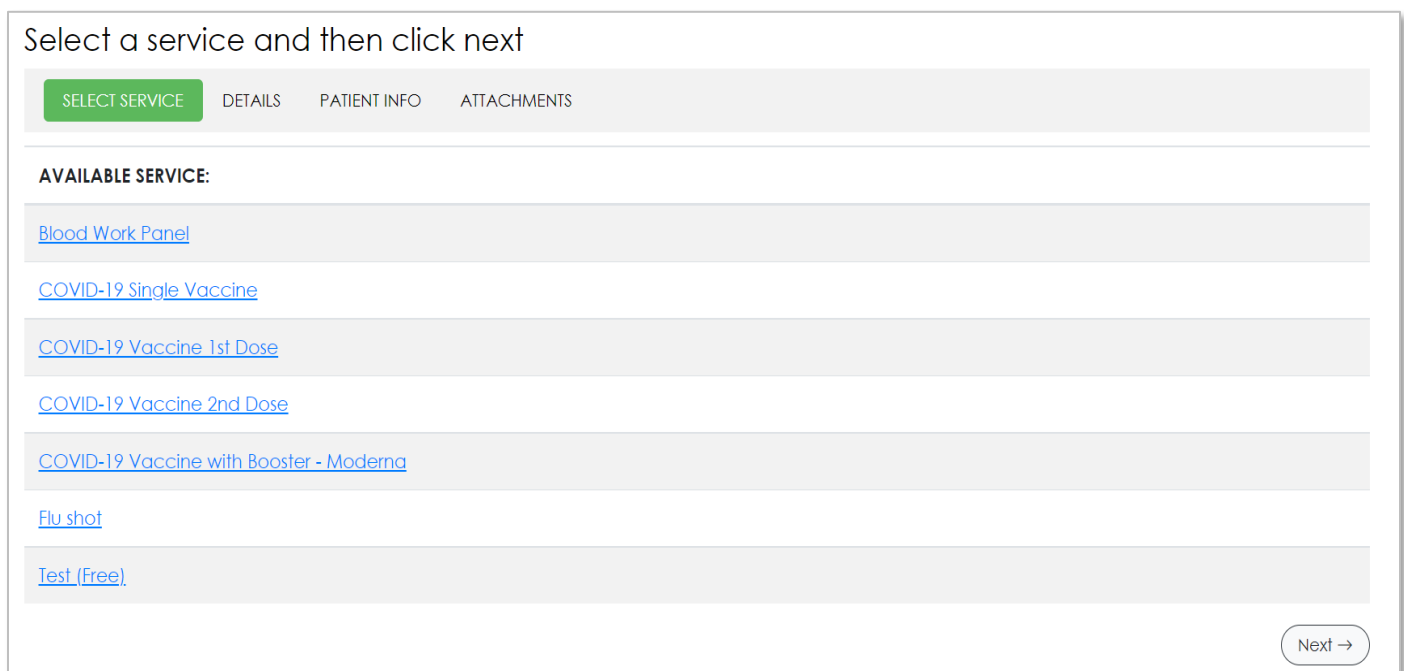
VaxManagerCX provides web-based scheduling functionality for busy clinics to manage all types of appointments. The system provides for quick and easy scheduling by staff along with the ability to extend the scheduling function to patients for self-scheduling of appointments from their personal or mobile device. The application allows organization to manage which services are available to staff vs patients to schedule.

- **Search and select what appointment slots are available for the health service they need**

VaxManagerCX's search query is simple to use. When scheduling an appointment, patients can select from a list of services offered by WCPHS for self-scheduling. If the selected service is available at more than one location, they can then choose their preferred location and then choose from a list of appointment slots either based on first availability or their preferred date and time.

Appointment time slots and capacity is defined using a flexible administrative tool, whereby WCPHS can activate/deactivate its list of available service, define the appointment lengths, days available and number of appointment time slots.

VaxManagerCX's scheduling solution has been designed to support high-volume scheduling scenarios where users are scheduling across multiple sites, regions, communities, etc. Conflicts are avoided during the scheduling of concurrent users by limiting the # of slots that a user can view at a time, and then removing held timeslots from the pool during the scheduling process for a limited time, like 3 minutes. If the user does not complete the scheduling process in that time frame the slots are returned to the pool.



Select a service and then click next

SELECT SERVICE DETAILS PATIENT INFO ATTACHMENTS

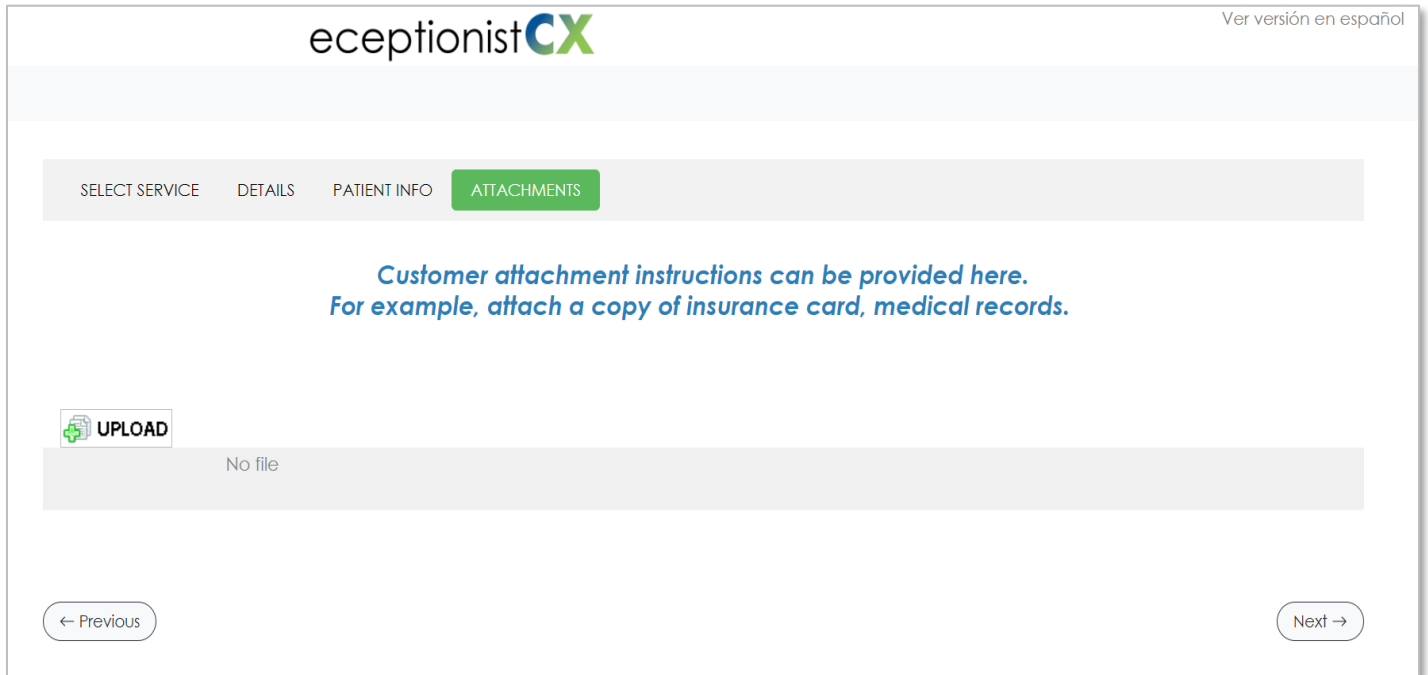
AVAILABLE SERVICE:

- [Blood Work Panel](#)
- [COVID-19 Single Vaccine](#)
- [COVID-19 Vaccine 1st Dose](#)
- [COVID-19 Vaccine 2nd Dose](#)
- [COVID-19 Vaccine with Booster - Moderna](#)
- [Flu shot](#)
- [Test \(Free\)](#)

Next →

- **Have the option to upload a picture of their immunization record at the time of scheduling the appointment.**

The VaxManagerCX scheduling process includes an attachments step where patients are able to upload an immunization card or other types of documentation when scheduling. Customers have the ability to edit custom text and instructions that displays to patients on the attachments tab.



- **Receive a confirmation via text or email with their appointment date/time.**

Robust patient engagement tools support the set-up of notifications such as appointment confirmations, notices and reminders by email or text, where appropriate. Additionally, patients can be emailed follow up surveys and questionnaires that can be created in VaxManagerCX. Notifications and survey can be set to automatically send at specific time frames, i.e. 1-week prior, 48 hours prior, 24 hours prior, 1 week following, 1 month following, etc.

- **Receive a reminder via text or email the day before the appointment.**

The VaxManagerCX Notifications tools allows for customer to define the appointment reminder time frame in hours, days and/or weeks.

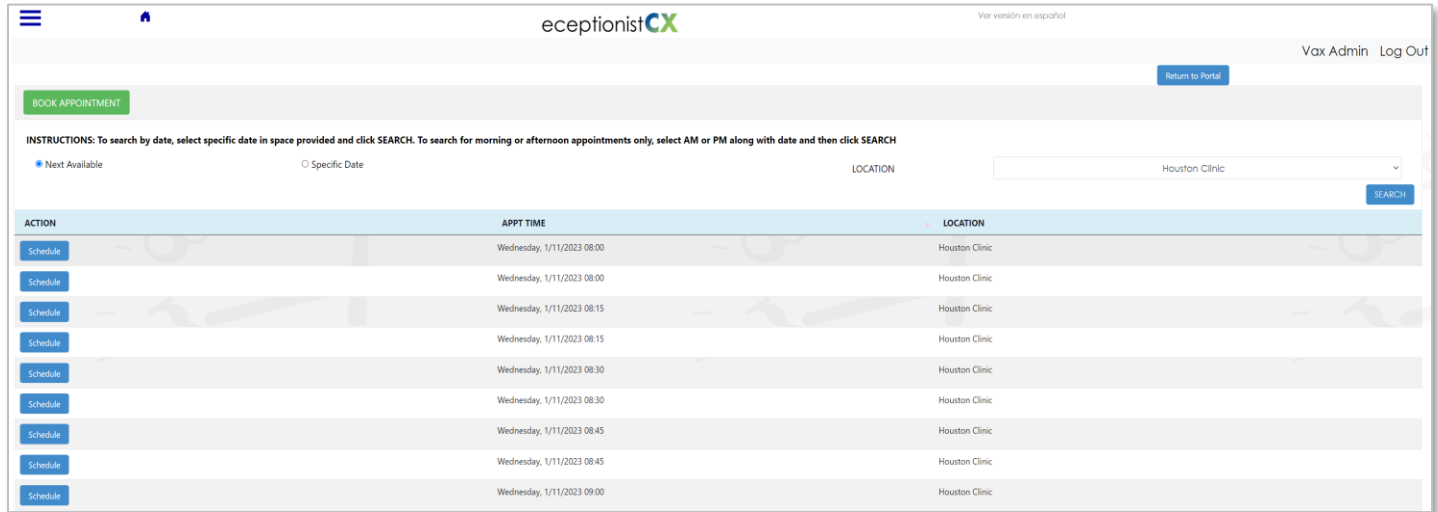
- **Have an option to cancel their appointment that would reopen their time slot for someone else to be able to schedule.**

Patients and organizational user can be granted permission to manage, cancel and reschedule appointments. Cancelled appointment timeslots are automatically released back into the pool of availability.

- **View appointment availability in real time.**

VaxManagerCX is a web-based solution that operates in real-time. Appointment availability displays to the any given user the current capacity in that moment. As appointments are scheduled in real-time, the

real-time capacity is automatically updated and displayed to the scheduler, whether it a be a patient or clinic staff user.



– **Block out time slots based on staff availability/county holidays.**

VaxManagerCX contains multiple functions for blocking timeslots and managing capacity as follows:

- **Block Holidays:** Organizations are able to define their own holidays in VaxManagerCX for managing days where the clinic would typically be open except for the observance of a holiday or other reason, such as a staff training day. Active holidays prevent any appointment timeslots from being available on a day and at a location where a holiday is being observed.
- **Block Clinic:** The block clinic feature allows for staff users to block time frames within an existing open schedule where appointments should not be available. For example, a clinic location may be closed for lunch between 12-1pm, whereas another location observes lunch from 12-12:30pm. The block clinic feature could be used to ensure that no appointments are scheduled during the lunch hour.
- **Reduce Capacity:** Within the clinic capacity, organizations can define the number of timeslots available at any given time based on staff capacity. For example, Clinic A may normally support 2 COVID vaccine appointments and 4 flu shot appointments every 15 minutes. However, due to a temporary staff reduction on Tuesday and Thursdays, VaxManagerCX allows for the clinic to reduce capacity either by (1) reducing the number of appointments every 15 minutes and/or by (2) increasing the timeframe of each appointment from 15 minutes to 20 minutes (for example) and/or by (3) reducing the number of available technicians available to perform a particular service. The method by which capacity is reduced is flexible based on the needs of the clinic with VaxManagerCX offering multiple solutions for managing availability.

– **Edit appointment times (i.e. group appointment times for multiple children from same household).**

In VaxManagerCX the ability to edit appointment times is available to staff users for accommodating group appointments and other scenarios where only a staff user should be able to edit the calendar. Additionally, the system provides the ability to define a group appointment type that could be longer than a typical appointment and made available to patients for special scheduling scenarios.

This particular requirement describes a scheduling scenario that could require some custom configuration to meet WCPHS's unique requirements in the handling of group appointments. A custom configuration of this type would be included in the onboarding and professional services fee and would allow for Eceptionist to configure the scheduling query and set-up of group appointments in a way that meets the

needs of WCPHS.

- **Delete duplicate appointment entries**

Staff users have the ability to delete duplicate appointments in VaxManagerCX. The system also provides tools for preventing the scheduling of duplicate appointment. For example, the system can display a warning to the scheduler when a duplicate appointment is about to be scheduled.

- **Add new service types.**

VaxManagerCX contains a service directory that is fully editable by the customer. While the initial list of services will be uploaded as part of the onboarding process. WCPHS will have the ability add, edit and deactivate service types as needed.

- **Add new service locations.**

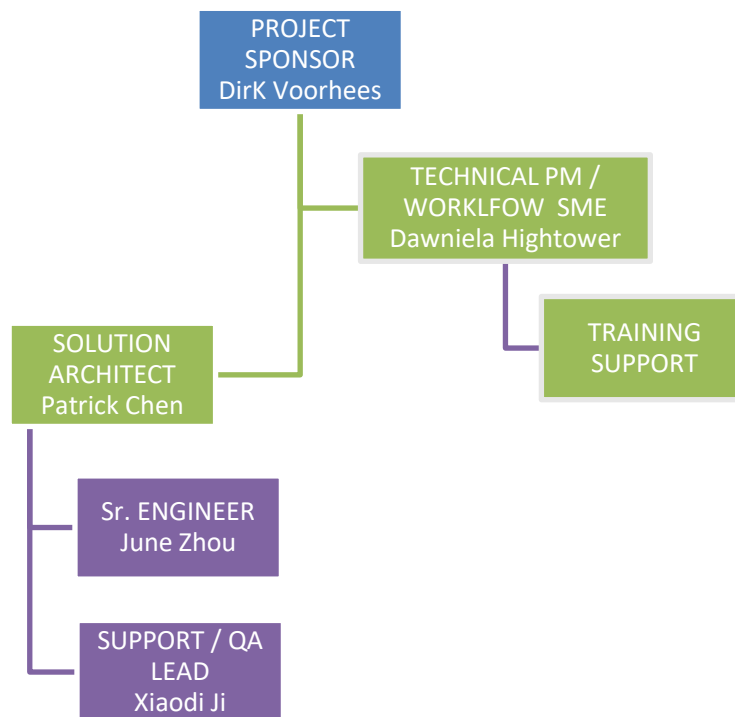
VaxManagerCX contains a location directory that is fully editable by the customer. While the initial list of locations will be uploaded as part of the onboarding process. WCPHS will have the ability add, edit and deactivate locations as needed.

Personnel Qualifications

PROJECT TEAM

Eceptionist will provide the following personnel resources for this project:

- **Project Sponsor** – Responsible for overall delivery of the project
- **Technical Project Manager** – Functions as both a project manager and SME on the functional solution and workflow.
- **Solution Architect** - Lead technical expert, responsible for managing the application delivery and technical staff
- **QA / UAT team members** – Multiple Resources as needed to conduct QA and support the UAT process.
- **Trainer** – Will provide web-based training.



KEY PERSONNEL

Product and Solution Design Lead, Dirk Voorhees

Dirk is a Principal of Eceptionist with over 25 years' experience working in Health IT, designing business solutions that encompass software development and design. He is one of the founders of Eceptionist, with hands-on experience overseeing all the company's original implementations. He brings vision and extensive experience providing project oversight to multiple types of software implementations. He has over 20 years' experience overseeing implementations of EceptionistCX globally in the US, Canada, UK, Italy, and Australia.

Qualifications - Academic:

- MPA/MBA / University of Texas at Austin 1995
- Bachelor of Science Business Administration (BSBA) / University of Arizona 1993

Solution Architect and Lead Systems Engineer, Patrick Chen

Patrick has been engineering software solutions for Eceptionist for more than 20 years. He is both an experienced software engineer and an applications integrator. He oversees a team of engineers and is responsible for bringing Eceptionist's roadmap to fruition. His technical experience includes proficiency in C/C++, C#, Python, Swift Assembler language, Java, JavaScript (jQuery, React.js, Vue.js), SQL, HTML, FHIR, CSS, PHP, and VB.

Qualifications – Academic:

- Master of Computer Science / University of Houston 2001
- Bachelor of Science in Civil Engineering / University of Chong Qing 1991

Technical PM & Customer Success, Dawniela Hightower

Dawniela has been leading implementations of EceptionistCX for nearly a decade. Her experience in software implementation includes managing numerous large-scale implementations with complex integrations and developing training programs and strategies for adoption. She brings extensive healthcare knowledge to projects, having previously served as both a consultant and trainer on many types of Health IT projects, including HIEs, EHR implementations, and quality initiatives. Dawniela lead the go-to-market rollout of the VaxManagerCX scheduling solution.

Qualifications – Academic:

- Bachelor of Science (BS), Business Administration

• ECEPTIONIST ADVANTAGE & ADDITIONAL FEATURES

The Eceptionist solution meets the County needs outlined in this proposal as demonstrated in the detail outlined in the above section - [Experience with Web Based Appointment Scheduling Software](#). Webb County will benefit from 20 years of experience in this space. Additionally, our offer:

1. Provides examples of how EceptionistCX meets each of the requirements outlined in the scope of services;
2. Shows a long history of experience with notable healthcare organizations, company longevity and long-standing experience with appointment scheduling systems;
3. Includes affordable pricing that allows WCPHS to expand and scale services without increased cost

Additional features that are available to WCPHS as part of this proposal include:

- **Electronic Consent** – VaxManagerCX provides the ability for patient provide digital consent (e.g. accept terms of the portal/app, provide to consent to be contacted, consent related to the specific service or information). The consent tool in VaxManagerCX offers flexibility. WCPHS can create consent templates as needed. WCPHS can set at what step in the workflow the consent form will display. Consent forms can vary by service and includes a merge field feature. Patients sign the consent form with an electronic signature, and a PDF version of the signed consent is created that can be made available to the patient and stored in WCPHS records within or outside of the application.
- **Reporting** - Robust reporting exists out of the box to report on # and detail of appointments by location, type, provider, region etc. as well processing time for those appointments. Reporting is offered in a stand-alone format where templates can be configured during onboarding. To support ad-hoc reporting needs, Eceptionist can offer database views to WCPHS to query the data and use third party tools to set-up reports as needed. Reports and data can be exported to a CSV file or other format as needed.
- **Forms & Surveys** – VaxManagerCX support the use of patient intake form for a range of

appointment types. The application includes admin tools where forms can be created and inserted into the scheduling process, as define in the workflow by WCPHS. WCPHS can use this tool to create/manage intake forms by site and service type.

- **Separate Consumer & Enterprise Scheduling Portals** – As part of this proposal, Eceptionist is offering WCPHS a scheduling portal for patients that can be viewed in both English and Spanish and accessed via mobile device, along with an enterprise scheduling portal where staff can administer and manage the schedule, and schedule/edit appointments on behalf of patients.

References and Projects

PAGE INTENTIONALLY LEFT BLANK

References Form

Please list at minimum five (5) local governmental entities where similar scope of services were provided.

THIS FORM MUST BE RETURNED WITH YOUR OFFER.

REFERENCE ONE

Government/Company Name: Louisiana Department of Corrections
Address: Baton Rouge, LA
Contact Person and Title: Melanie Benedict, RN Manager, Scheduling
Phone: 225-342-7249 Fax: _____
Email Address: melanie.benedict@la.gov Contract Period: 5/13/2013 - Present

Description of Professional Services Provided: LDOC is responsible for managing specialty care services for all prisoners housed in DOC prisons and Parish jails across the state. LDOC uses Exceptionist to manage the referrals for all specialty services as well as all of the scheduling.

REFERENCE TWO

Government/Company Name: Vital Core Health Strategies
Address: 805 Wheatley St, Suite 340 Ridgeland, MS 39157
Contact Person and Title: Raman Singh, MD
Phone: (601)499-5660 x 211 Fax: _____
Email Address: rsingh@vitalcorehs.com Contract Period: 9/2/2022 Present

Description of Professional Services Provided: VitalCore provides the state correction system in Mississippi with all specialty services. VitalCore and the state of Mississippi use Exceptionist to manage the coordination of all specialty care including scheduling and referrals.

REFERENCE THREE

Government/Company Name: Vail Health
Address: Vail, Colorado
Contact Person and Title: Julie Jackson BSN, RN-BC, FAB
Phone: 970-477-3790 Fax: _____
Email Address: Jackson@VailHealth.org Contract Period: 11/17/20 - Present
Description of Professional Services Provided: Vail Health used Vax Manager service (Exceptionist) to support self-scheduling, registration, consent and other activities around supporting covid testing, covid vaccinations, etc. Exceptionist was integrated with Corner and AIScripts.

REFERENCE FOUR

Government/Company Name: Alberta Health Services (AHS)
Address: Edmonton, Alberta, Canada T5H 3V9
Contact Person and Title: Brian Bailey - Application Analyst - IS Scheduler (Exceptionist)
Phone: _____ Fax: _____
Email Address: Brian.Bailey2@ahs.ca Contract Period: 5/15/17 - Present
Description of Professional Services Provided: AHS uses Exceptionist to manage the scheduling of all collaborative services across the province of Alberta in Canada. This includes all virtual meetings and appointments.

REFERENCE Five

Government/Company Name: Telus Health Centres

Address: Montreal, Quebec, Canada

Contact Person and Title: Sarah Mackay

Phone: 514 464 7353 Fax: _____

Email Address: Sarah.mackay@Telus.com Contract Period: 11/12/19 - Present

Description of Professional Services Provided: Telus Corporation owns Telus Health Centres across the country of Canada. Telus Health Centres provide basic health and wellness services to small and large employers across Canada. Telus Health Centres use Exceptionist as their customer portal to manage all aspects of scheduling.

- ****Additional pages are permitted if more space is required****

Space intentionally left Blank

Convenience of Navigation Tools and Real Time Information

The Eceptionist VaxManagerCX solution is an easy-to-use and navigate web-based solution. It was designed to be intuitive with wizards and information guides so that appointments can be scheduled by a user without any training required.

There are numerous features and design principles that have been employed to optimize the usability of VaxManagerCX including the following.

Intuitive Scheduling Process & Navigation. VaxManagerCX offers a flexible scheduling process that can be configured during onboarding to meet customer requirements. By default, the solution will provide the patient/provider with the ability to search among:

- first available appts across multiple sites
- first available at the closest location
- a date range of their choosing at one or multiple sites

Optimize Schedule Availability. VaxManagerCX's scheduling solution has been designed to support high-volume scheduling scenarios where users are scheduling across multiple sites, regions, communities, etc. Conflicts are avoided during the scheduling of concurrent users by limiting the # of slots that a user can view at a time, and then removing held timeslots from the pool during the scheduling process for a limited time, like 3 minutes. If the user does not complete the scheduling process in that time frame the slots are returned to the pool.

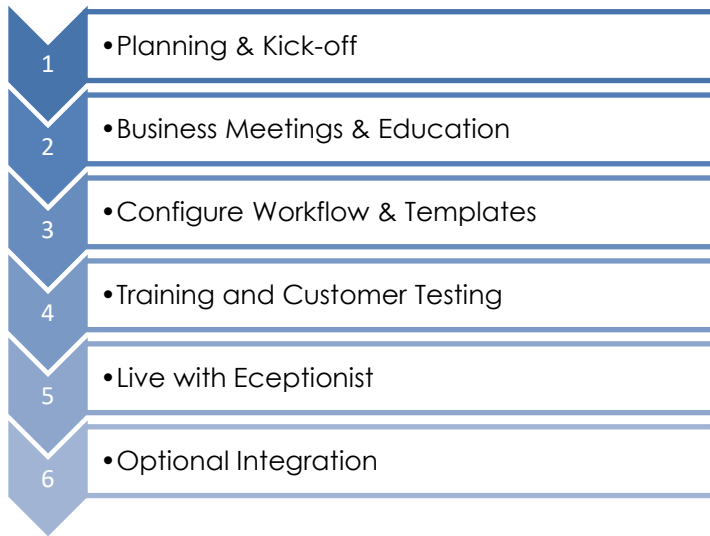
Clear Messaging & Labels. User experience is a key priority in the design of VaxManagerCX. It has been designed such that a person with little to no computer expertise can easily navigate the functions and workflow of the application. During the implementation WCPHS will additionally have the ability to change/update labels to match with their own familiar naming conventions.

Supplemental screenshots of the mobile version views and navigations have been included in the addendum - [Mobile Screenshots](#).

Other Information & Benefits

PROJECT TIMELINE

The approach utilized to onboard customers to the Eceptionist VaxManagerCX product is direct and efficient. We follow a methodology that has been proven successful and that allows for customers to on onboard at a pace that is comfortable to them, whether that be rapid, phased or a combination of both.



A high-level overview of the project timeline is included below. Key project tasks and timeframes are listed below. This schedule represents a summary of major milestones represented in a standard onboarding plan. Actual dates will be determined based on the project start date.

WCPHS 5 -Week High-Level Sample Project Timeline				
Key Milestones		Resource	Start Date	Planned Complete
	Project Kick-off	All	Feb 1	Feb 1
	Prepare Customer Environments & Deploy VaxMgr	Ecept Dev	Feb 1	Feb 8
	Access to Standard Version Provided	Ecept Dev to WCPHS	Feb 8	Feb 8
	Business Meetings - Confirm Configurations	All	Feb 2	Feb 16
	Complete Onboarding Package High Priority Items	WCPHS Business	Feb 16	Feb 16
	Complete Onboard Package - Other Items	WCPHS Business	Feb 16	Feb 19
	Customer Application Configurations Applied	Ecept Dev	Feb 11	Feb 18
	Provide reference data in templates & White Label info	WCPHS Business	Feb 18	Feb 18
	Reference Data Upload	Ecept Dev	Feb 18	Feb 19
	Schedule, Template, Notification Workflow Logic Set-up	Ecept Dev/ Business	Feb 20	Feb 22
	Training Documents / Training Program Provided	Ecept Business	Feb 20	Feb 22
	WCPHS Validation & Feedback	WCPHS Business	Feb 23	Feb 27
	Issue Resolution & Final Validation	Ecept Dev / WCPHS Business	Feb 28	Mar 3
	Training Program Deployed	Ecept/WCPHS Bus	Feb 28	Mar 3
	Go-Live / User Onboarding	All	Mar 6	Mar 10

TRAINING METHODOLOGY & SERVICES

Quality training is imperative for a successful implementation and overall adoption of any software. Eceptionist recommends that training be provided through a combination of in-person group training and web-based group training. A custom training plan will be created to meet the specific needs of SHA, to include train-the-trainer principles to ensure client is capable of onboarding new and future users over the life of the agreement and end-user training.

During the planning phases of the project, we will work with SHA to refine a training plan that meets the Clients training requirements (including methods and types of training) while at the same time working within the allocated training budget.

Timely, relevant training is foundational to the success of adoption and on-going support. Training ensures that technical staff and end-users are equipped with the knowledge and skills to be successful while also providing growth and development opportunities. Peripherally, training also fosters teambuilding, providing opportunities for the team to learn from each other, working collaboratively as they learn new skills, processes, and technologies.

Our training approach is based on the principles of timeliness, hands on experience and relevancy. Training is most effective when conducted "just in time." Training courses are scheduled just shortly before the new skill or knowledge is required. Our experience indicates that training is most effective when it can be applied in a real-life situation as quickly as possible. Through this principle, our approach works to increase retention and maximize the learning absorbed in class to the real-life situation.

In addition to the training that is provided, Eceptionist will provide the Client with User Documentation, Tip Sheets and video resources for patients and others who won't require any instructor lead training. Eceptionist also includes a web based online help tool that individual users can leverage for guidance around using the system.

Pricing Proposal

This proposal highlights Eceptionist's proposal for Webb County Public Health Services ("WCPHS") staff and consumers to use Eceptionist's VaxManagerCX service as a tool to manage appointment booking via the EceptionistCX's enterprise portal and CustomerCX portal.

The Eceptionist pricing model being proposed is designed for WCPHS and the consumers that WCPHS provides the services defined in the related RFP. This option comes with the following features:

- Use of Eceptionist's VaxManagerCX software as a service.
- Organizational Landing Page– Under this proposal, WCPHS will receive a personal landing page (one for the enterprise portal and one for the CustomerCX portal) that can be white labeled for WCPHS. Note, white labeling includes incorporating WCPHS's logo and a WCPHS label but does not include changing the layout of the Eceptionist platform
- Integrated URL – Under this option, Eceptionist will work with WCPHS to integrate the URL into the WCPHS's website

PRICING STRUCTURE

The service and fee structure that Eceptionist is proposing to WCPHS to support web-based appointment scheduling for the services defined in the related RFP via EceptionistCX's portal is a service-based model.

Agreement Term (the "Term"):

Three (3) years starting from the Effective Date of an Agreement. The Agreement will automatically renew for additional, successive one-year periods, unless either party gives the other party written notice of termination at least 90 days before the end of the initial term or of any successive two-year term thereafter.

Accessed Products:

EceptionistCX's VaxManagerCX, CustomerCX plus the related administrative tools.

Annual Service Fee

For each annual period (i.e., 12 month period – "Measurement Period") during the Term of the Agreement, WCPHS agrees to pay Eceptionist a minimum **annual service fee of \$25,000** (the "Annual Service Fee") for use of EceptionistCX in a given Measurement Period across all of WCPHS as it relates to the services being managed via Eceptionist.

▪ Pricing Notes:

- Enterprise access for WCPHS to use EceptionistCX to manage all scheduling related activities defined in the related RFP. Note, this includes the ability to define appointment slots, WCPHS scheduling appointments on behalf of patients as well as consumers self-scheduling their own appointments. WCPHS has the option to use EceptionistCX to manage services (not defined in the RFP) but there may be additional fees required to use EceptionistCX to manage these services.
- The Annual Service Fee for the first year (i.e., the first Measurement Period) is due on the Effective Date of the Agreement and due on each anniversary of the subsequent Measurement Periods during the Term (i.e., due at the beginning of each contract year during the Term).
- The Minimum Annual Service Fees are subject to a three percent (3%) increase per year during the Term.
- The Annual Service Fee covers:
 - Unlimited number of Patients/Consumers
 - Unlimited number of providers
 - Unlimited number of users
 - Unlimited number of WCPHS sites
 - Unlimited number of events (i.e., scheduled appointments)
 - Services are limited to those services defined in the RFP
- The Annual Service Fee includes tier 2 support (i.e., support to WCPHS's designated staff) and

access to all upgrades during the Term of the Agreement.

- End User support (e.g., direct customer support to the patents) is not included
- The Annual Service Fee covers SMS/text messages to support dual factor authentication during the account creation process (i.e., the first time a given user logs onto the system). Dual factor authentication for subsequent logins by users is by default supported via email messages. If WCPHS wants to use SMS/text message for dual factor authentication for subsequent logins (i.e., beyond the first login), EceptionistCX can support this with SMS/text messages but WCPHS will need to purchase blocks of SMS/text segments to support this.
- The default message medium within EceptionistCX for notifications, confirmations, reminders, etc. is email messages. EceptionistCX will be happy to support any type of notification, confirmation, reminder, etc. Via SMS/text but WCPHS will be required to purchase blocks of SMS/text segments to support this.
- SMS/text message segment blocks can be purchased at any point during the Term of the Agreement for the following price:
 - Block of 50,000 message segments (up to 136 characters for each segment) for \$2,250 USD
 - The Fees are in US Dollars.
 - All Fees payable by WCPHS to Eceptionist under this proposal are exclusive of any and all applicable sales, use, VAT or other taxes. Except for any taxes based on Eceptionist's net income, WCPHS pay and be solely responsible for any and all sales, use, VAT or other taxes of any kind assessed or levied in connection with the licenses and services provided to WCPHS by Eceptionist under any Schedule. In addition, WCPHS will be responsible for the operation of any withholding taxes that are placed on any payments that are made pursuant to this Exhibit.
 - The use of software is for the Term and not a license in perpetuity.

▪ Professional Service Estimates

The following onboarding services will be provided in conjunction with onboarding WCPHS to EceptionistCX SaaS. If there are additional services that are required to implement this project that are outside of the scope defined in this proposal, then this work can be defined and implemented under a Change Order as defined in an Agreement that is ultimately agreed to. If additional services are required by Eceptionist that are beyond what is defined in this proposal, Eceptionist is happy to do these on a time and materials basis.

▪ Environments

WCPHS will receive 2 EceptionistCX environments including Production and Test.

▪ Timeline

We have assumed an onboarding timeline from project kickoff to "go live" of approximately 3 to 6 weeks. Note, this can be expanded or compressed but this assumption is based upon a typical deployment of the solution based upon the scope of work defined in this proposal. If the timeline were to go over this period, the amount of effort could potentially increase.

▪ Onboarding Services

As part of onboarding WCPHS onto the EceptionistCX service, there are some general services that Eceptionist will provide as part of the onboarding. Some examples of the general implementation services are included below:

Notification Review, Confirmation & Configuration

Within this task, the Eceptionist team lead will introduce the concept of system generated notifications and will review the various types of notifications that can be turned on in the system, e.g., user notifications, patient notifications, etc. Notifications may be triggered based on request status or other user actions. Eceptionist is equipped with numerous default notification mechanisms that can be activated during the configuration process. It is rare that a customer will choose to activate them all. In some cases, a customer may choose to go live with limited notifications and expand their use post user training and onboarding.

White Label Configuration

Eceptionist will white label WCPHS's landing page within Eceptionist's VaxManagerCX. Note, white labeling

includes incorporating the logo and label onto WCPHS's landing page but does not include changing the layout of the Eceptionist platform.

Eceptionist Project Management

Eceptionist will have a team lead assigned to the project over the duration of the implementation. This person will lead the project and will coordinate all Eceptionist resources that are required to support the project.

- **Integration**

Eceptionist has assumed no integration between EceptionistCX and third-party systems for this project. Eceptionist is happy to provide these services on a time and materials basis.

- **Existing Event Data Migration**

Eceptionist has assumed no data migration of existing events for this project.

- **Reports**

Eceptionist has assumed no custom reports. WCPHS will get access to all of the canned reports related to the functions in Eceptionist that WCPHS has access to.

- **Training**

Eceptionist has assumed a "train the trainer" approach for this project. Eceptionist has assumed 3 days of training effort for this project of which 2 days are allocated to web based functional and admin training with the remaining day allocated to training preparation, web-based and implementation related training.

- **Onboarding Fees**

Onboarding fees are a one-time cost for the service efforts required for the implementation services described in this proposal. Onboarding fees total \$15,000 as a one-time payment.

*Note, the rates are in US Dollars.

The Onboarding Fee will be billed as follows:

Effective Date: \$5,000

Effective Date + 30 Days: \$5,000

Effective Date + 60 Days: \$5,000

- **Travel**

Eceptionist has assumed that all of this work will be done remotely and off-site. In the event that travel costs are required, WCPHS would be responsible for reasonable travel and accommodation expenses that are approved in advance by WCPHS.

- **Total Cost**

Service	Year One	Year Two	Year Three
Professional Services	\$15,000	\$0	\$0
Annual License	\$25,000	\$25,000	\$25,000
Total Annual Cost*	\$40,000	\$25,000	\$25,000

*See pricing notes above

Addendum

- *Mobile Screenshots*
- *Vail Health Case Study*

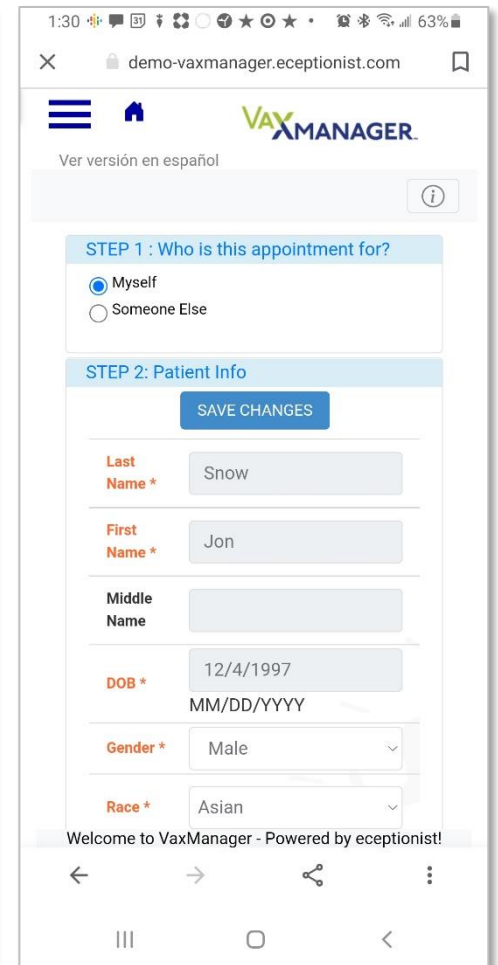
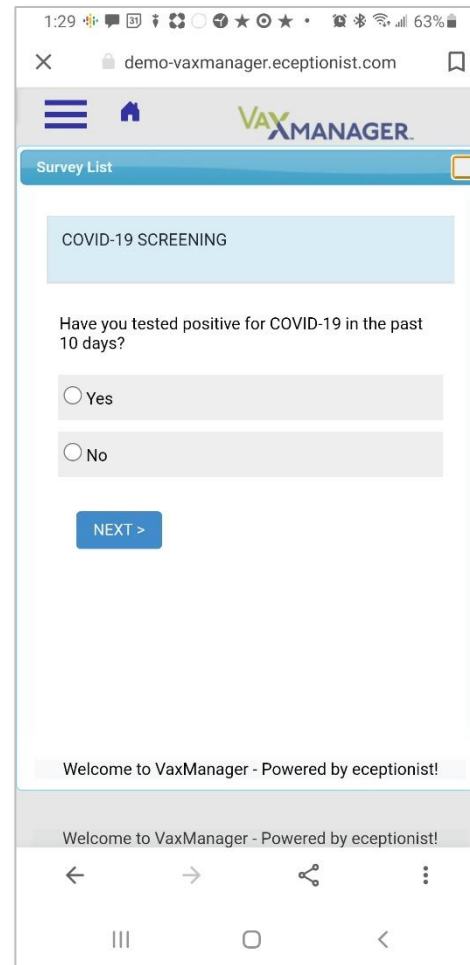
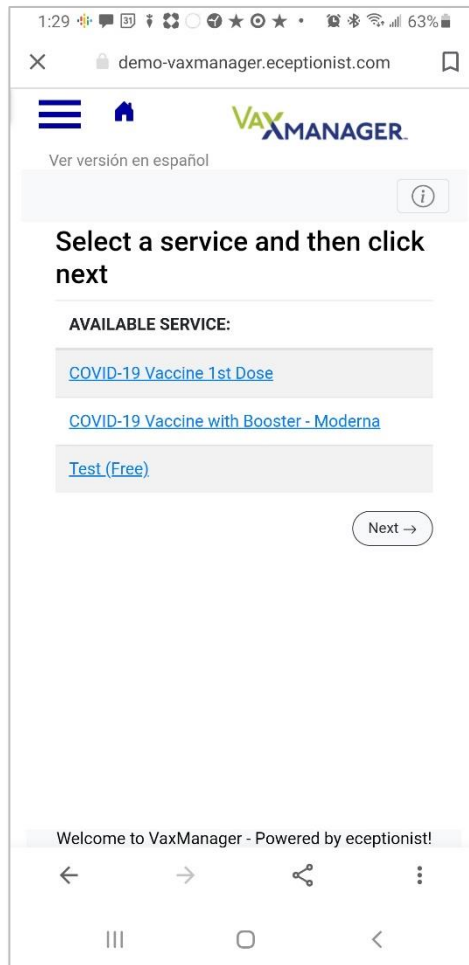
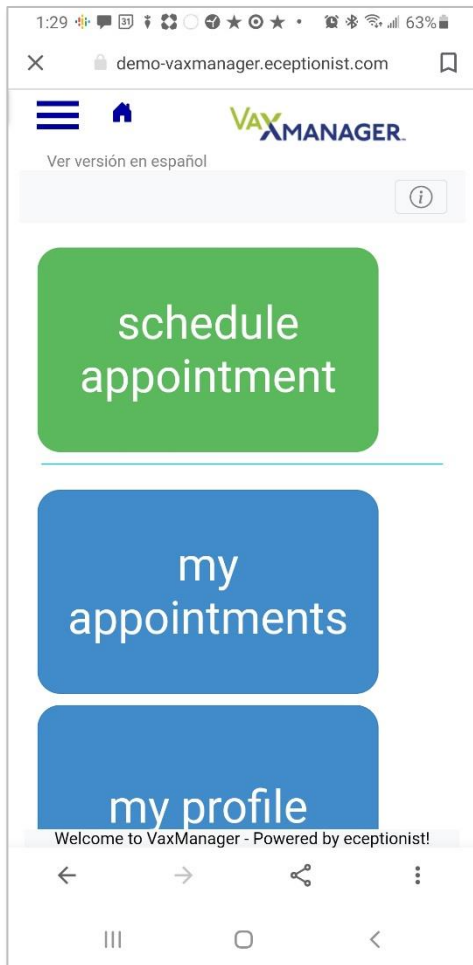
REMAINING PAGE IS DELIBERATELY BLANK

Home Dashboard

Response Based Form

Select a Service

Patient Info

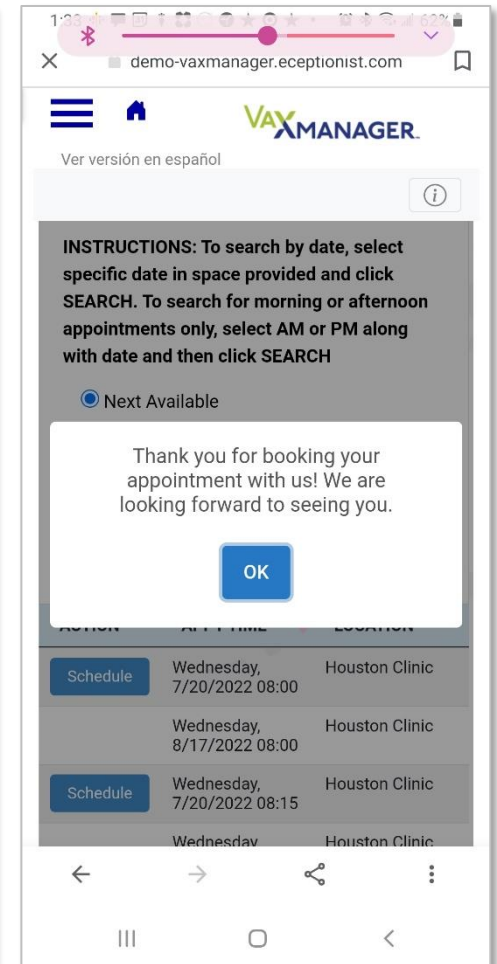
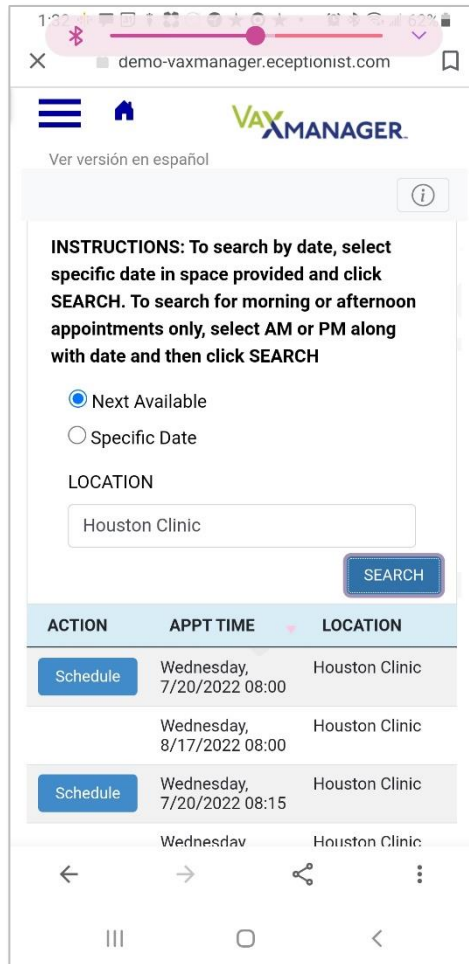
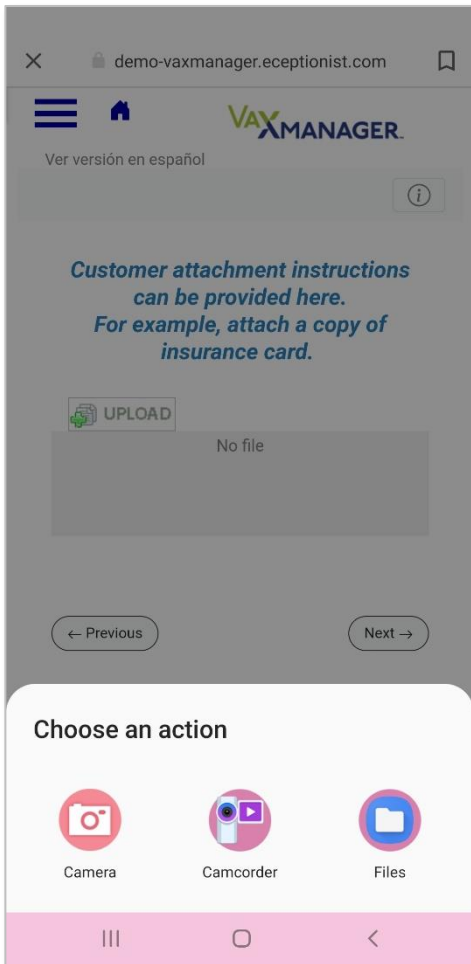


Integrated Camera Capture

Sign Consent

Select an Appointment

Appointment Confirmation





VAIL HEALTH

During the peak of the Covid-19 pandemic Vail Health faced an administrative burden trying to manage a demand for many hundreds of COVID-19 tests per day at multiple facilities. Located in a popular Colorado ski resort area, Vail Health serves permanent residents along with a fluctuating population of part-time residents and seasonal tourists that all were helping to swell the demand for COVID-19 tests. The manual process of registering each patient in their EHR, scheduling the appointment, and managing the lab process was extremely burdensome on staff, and proved time-wasted when patients were a no show.

Vail Health approached Eceptionist to provide a patient self-scheduling portal that would allow patients to schedule and manage their own testing appointments. To alleviate staff burden, the scheduling portal needed to integrate to multiple EHR systems to automate the registration, scheduling, and lab order processing. VaxManager was determined to meet the requirements for an existing consumer facing application and Eceptionist's demonstrated experience in integration pushed the decision over the goal line.

In November 2020, Eceptionist and Vail Health began working to define the scheduling workflows and consumer experience. Vail Health's VaxManager scheduling portal launched 5-weeks later as a stand-alone solution. Integration from VaxManager to Vail Health's EHRs was incorporated a few months later during phase two of the project. At its peak, between



1,500-2,000 Covid-19 test and vaccine appointments were being self-scheduled through the VaxManager self-scheduling portal every day.

Eceptionist VaxManagerCX

VaxManagerCX is a great service for busy immunization and testing clinics, employers, and other organizations that need to stay compliant while managing and delivering on vaccination mandate requirements. Like the entire EceptionistCX solution, VaxManagerCX is web-based, mobile-friendly, and interoperable with clinical and other systems (HL7, FHIR, API, etc.). The intelligent scheduling within VaxManagerCX facilitates self-service patient screening while helping track patient check-ins and no-shows with great reporting

ECEPTIONIST SERVICE USED



VaxManagerCX
eceptionist

To get a free demo of this service or more information on VaxManagerCX please visit eceptionist.com/services

CERTIFICATION
REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY
EXCLUSION FOR COVERED CONTRACTS

PART A.

Federal Executive Orders 12549 and 12689 require the Texas Department of Agriculture (TDA) to screen each covered potential contractor to determine whether each has a right to obtain a contract in accordance with federal regulations on debarment, suspension, ineligibility, and voluntary exclusion. Each covered contractor must also screen each of its covered subcontractors.

In this certification "contractor" refers to both contractor and subcontractor; "contract" refers to both contract and subcontract.

By signing and submitting this certification the potential contractor accepts the following terms:

1. The certification herein below is a material representation of fact upon which reliance was placed when this contract was entered into. If it is later determined that the potential contractor knowingly rendered an erroneous certification, in addition to other remedies available to the federal government, the Department of Health and Human Services, United States Department of Agriculture or other federal department or agency, or the TDA may pursue available remedies, including suspension and/or debarment.
2. The potential contractor will provide immediate written notice to the person to which this certification is submitted if at any time the potential contractor learns that the certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
3. The words "covered contract", "debarred", "suspended", "ineligible", "participant", "person", "principal", "proposal", and "voluntarily excluded", as used in this certification have meanings based upon materials in the Definitions and Coverage sections of federal rules implementing Executive Order 12549. Usage is as defined in the attachment.
4. The potential contractor agrees by submitting this certification that, should the proposed covered contract be entered into, it will not knowingly enter into any subcontract with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the Department of Health and Human Services, United States Department of Agriculture or other federal department or agency, and/or the TDA, as applicable.

Do you have or do you anticipate having subcontractors under this proposed contract?

Yes

No

CERTIFICATION REGARDING FEDERAL LOBBYING
(Certification for Contracts, Grants, Loans, and Cooperative Agreements)

PART A. PREAMBLE

Federal legislation, Section 319 of Public Law 101-121 generally prohibits entities from using federally appropriated funds to lobby the executive or legislative branches of the federal government. Section 319 specifically requires disclosure of certain lobbying activities. A federal government-wide rule, "New Restrictions on Lobbying", published in the Federal Register, February 26, 1990, requires certification and disclosure in specific instances.

PART B. CERTIFICATION

This certification applies only to the instant federal action for which the certification is being obtained and is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No federally appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, or the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with these federally funded contract, subcontract, subgrant, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions. (If needed, contact the Texas Department of Agriculture to obtain a copy of Standard Form-LLL.)

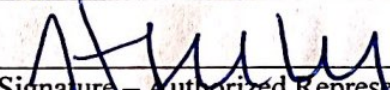
3. The undersigned shall require that the language of this certification be included in the award documents for all covered subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all covered subrecipients will certify and disclose accordingly.

Do you have or do you anticipate having covered subawards under this transaction?

- Yes
 No

Name of Contractor/Potential Contractor	Vendor ID No. or Social Security No.	Program No.
E-ceptionist, Inc.	20-3788535	

Name of Authorized Representative	Title
Dirk Voorhees	Principal


Signature - Authorized Representative

1/6/22
Date

Offeror: Complete & Return this Form with Response Submission.
Senate Bill 252 Certification

SB 252 CHAPTER 252 CERTIFICATION I, Dirk Voorhees, the undersigned representative of E-Geotek, Inc. (Company or business name) being an adult over the age of eighteen (18) years of age, pursuant to Texas Government Code, Chapter 2252, Section 2252.152 and Section 2252.153, certify that the company named above is not listed on the website of the Comptroller of the State of Texas concerning the listing of companies that are identified under Section 806.051, Section 807.051 or Section 2253.153. I further certify that should the above-named company enter into a contract that is on said listing of companies on the website of the Comptroller of the State of Texas which do business with Iran, Sudan or any Foreign Terrorist Organization, I will immediately notify Mr. Jose Angel Lopez III, Webb County Purchasing Agent at (956) 523-4125 or via email at joel@webbcountytx.gov

Dirk Voorhees Name of Company Representative (Print)

[Handwritten Signature] Signature of Company Representative

1/6/22 Date

Offeror: Complete & Return this Form with Response Submission.

House Bill 89 Verification

I, Dirk Voorhee, the undersigned representative of (company or business name) E-Cyptionist, Inc. (heretofore referred to as company) being an adult over the age of eighteen (18) years of age, after being duly sworn by the undersigned notary, do hereby depose and verify under oath that the company named above, under the provisions of Subtitle F, Title 10, Government Code Chapter 2270:

1. Does not boycott Israel currently; and
2. Will not boycott Israel during the term of the contract.

Pursuant to Section 2270.001, Texas Government Code:

1. "Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made ordinary business purposes; and
2. "Company" means a for-profit sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or an limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate of those entities or business association that exist to make a profit.

Hugh Dirk Voorhees
Signature of Company Representative

January 7, 2022

Date

On this 7th day of January, 2023, personally appeared

Hugh Dirk Voorhees, the above named person, who after by me being duly sworn, did swear and confirm that the above is true and correct.

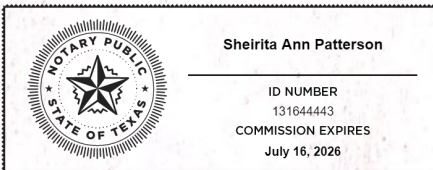
Notary Seal

Sheirita Ann Patterson
Notary Public, State of Texas

Notary Signature

01/07/2023

Date



Notarized online using audio-video communication

PROOF OF NO DELINQUENT TAXES OWED TO WEBB COUNTY

Name Dirk Voorhees owes no delinquent property taxes to Webb County.

E-Captionist, Inc owes no property taxes as a business in Webb County.
(Business Name)

Dirk Voorhees owes no property taxes as a resident of Webb County.
(Business Owner)

Hugh Dirk Voorhees

Person who can attest to the above information

*** SIGNED NOTORIZED DOCUMENT AND PROOF OF NO DELINQUENT TAXES TO WEBB COUNTY.**

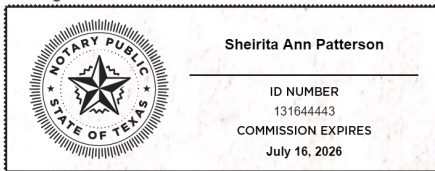
The State of Texas

County of ~~Webb~~ ^{Harris} *SAP*

Before me, a Notary Public, on this day personally appeared Hugh Dirk Voorhees, know to me (or proved to me on the oath of Him/He) to be the person whose name is subscribed to the forgoing instrument and acknowledged to me that he executed the same for the purpose and consideration therein expressed.

Given under my hand and seal of office this 7th day of January 2023.

Notary Public, State of Texas



Sheirita Ann Patterson
Notary Public, State of Texas

(Print name of Notary Public here)

My commission expires the 16 day of July 2023.

THIS FORM MUST BE INCLUDED WITH RFP PACKAGE; PLEASE CHECK OFF EACH ITEM INCLUDED WITH RFP PACKAGE AND SIGN BELOW TO COMPLETE SUBMITTAL / COMPLETION OF EACH REQUIRED ITEM.

**ARPA Project No. 14
Webb County Public Health Services – Appointment Scheduling Software**

- References Form

- Conflict of Interest Form (CIQ) - **NOT APPLICABLE**

- Certification regarding Debarment (Form H2048)

- Certification regarding Federal lobbying (Form 2049)

- Code of Ethics Affidavit

- House Bill 89 Form

- Senate Bill 252 Form

- SAMs Registration completed by Offeror (**See Section 1.13**)

- Proof of No Delinquent Tax Owed to Webb County

Dawniela Hightower
Signature of Person Completing this Package

1/16/23
Date