



BOARD OF COMMISSIONERS Agenda Item Summary

Agenda Category: Bids/Awards/Proposals Item No:

Meeting Date: 9/5/23

Department: Human Resources

Issue: In the matter of accepting the quote from Care Validate for leave tracking software.

Background: Klamath County Human Resources would like to purchase a software to better track employees who are out on FMLA/OFLA/PLO. The software will also allow employees to fill out forms digitally, track the approval process, and request ADA accommodations. We received three quotes for this product:

- Care Validate: \$0.50/month per employee (\$250/month total) + \$2,500 one time ADA support fee
- AbsenceSoft: \$48,000 annually (\$4,000/month total)
- PulpStream: \$4.75/month per employee (\$2,375/month total) + \$5,000 implementation fee

Human Resources requests that the quote be awarded to Care Validate

Recommended Motion: Board to accept the quote from Care Validate for leave tracking software for \$250/month for three years. **Fiscal Impact: none.**

DONE AND DATED this _____ day of _____, 20__.

 Chair
 Approved
 Denied

 Vice-Chair
 Approved
 Denied

 Commissioner
 Approved
 Denied



Klamath County

Klamath County
305 Main Street
Klamath Falls, OR 97601
United States

Reference: 20230728-164541428
Quote created: July 28, 2023
Quote expires: October 26, 2023
Quote created by: Barrett Davis

barrett@carevalidate.com

Andrea Lassett
alassett@klamathcounty.org
5418834296

Comments from Barrett Davis

We're excited to have you use AccommoCare+

Products & Services

Item & Description	Quantity	Unit Price	Total
AccommoCare - PEPM Full Access to AccommoCare	500	\$0.50 / month	\$250.00 / month for 3 years
<ul style="list-style-type: none"> - Digital Employee Forms - Enterprise ADA Case-Management Platform - Automation & Workflows - Onboarding & Support 			

Item & Description	Quantity	Unit Price	Total
AccommoCare+ 10 bundle Full Access to AccommoCare & On-demand medical & legal committees	10	\$250.00	\$2,500.00 for 3 years
<ul style="list-style-type: none"> - Digital Employee Forms - Enterprise ADA Case-Management Platform - Escalation available to our on-demand legal & medical committees - Automation & Workflows - Onboarding & Support 			
		Monthly subtotal	\$250.00
		One-time subtotal	\$2,500.00
		Total	\$2,750.00

Purchase terms

Signature

Before you sign this quote, an email must be sent to you to verify your identity. Find your profile below to request a verification email.

<p>Andrea Lassett alassett@klamathcounty.org</p>	<p>Verify to sign</p>
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Pricing

Annual Subscription Fee

Our annual subscription fee is priced per module.

Pricing below is based on **1,000 employees or less**.

Annual Price	General FMLA/LOA	ADA	Employee Self-Service	Text Messaging	Fax Barcoding	Batch Print	Advanced Reporting	Total Annual Cost for In-Scope Modules
\$42,000		\$6,000	\$6,000	\$3,000	\$3,000	\$3,000	\$3,000	TBD

Pricing is subject to change. This pricing is valid for 90 days from sent-by date.



Proposal for total LOA Automation

“Leave of Absence, Accommodation, and Medical Case Management”



Aug 9. 2023

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PRICING PROPOSAL

Pulpstream Inc. (Pulpstream) is pleased to provide Pricing Proposal as part of your LOA System evaluation exercise. We are eager to partner with your organization in this digital transformation journey and help the team meet their short term and long-term goals by streamlining their Business Processes involving Leave of Absence and Accommodation. Our response has been built in the spirit of a long-term partnership and trust through transparency and flexibility.

Our Mission

We intend to help companies fully automate and streamline their business processes to ensure compliance, gain operations efficiency, and elevate employee experience. We are currently working with 100s of organizations across US, we have helped them move from a completely manual, paper-based processes to an automated environment using both web and mobile (online and offline).

Our Goals

- Eliminate Roadblocks to efficient work environment through automation
- Ensure Compliance with State and Federal laws
- Enable information access anytime anywhere
- Empower business users, reduce dependence on IT through a visually customizable system using drag and drop interfaces
- Remove information silos through integration



Automate Processes

Empower Business Users and Reduce Dependence on IT



Maximize Employee Self-Service



Connect Process Silos

Our Platform

Pulpstream is a fully customizable Business Process platform that empowers the employees by digitizing their business processes. The following 5 forces are the key pillars of Pulpstream to help streamline Business Operations:

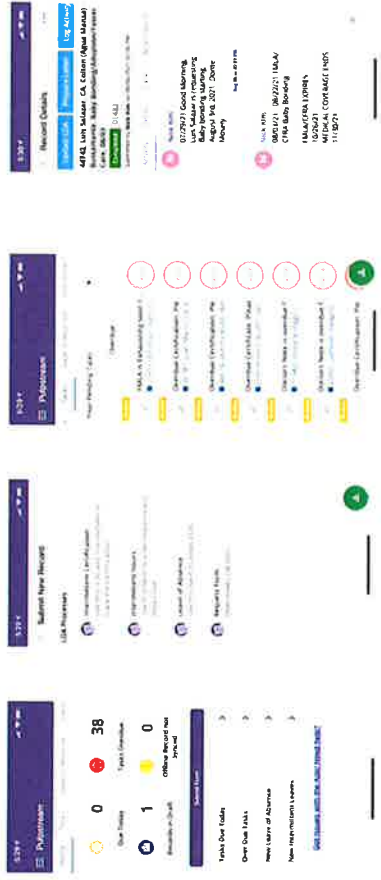


Business Processes

Business Processes are at the heart of Pulpstream. By treating every use case as a Business Process, Pulpstream is able to ensure that everything related to the process, like Workflows, Rules, Approvals, Tasks, Document Generation, Attachment of Photos & Files, Corrective Actions, SMS and Push Notifications etc. are built into the solution and nothing slips through the cracks.



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Modules

Module	Description
LOA	<ul style="list-style-type: none"> • Continuous/Intermittent LOA • Intermittent Hours Reporting • Fully Compliant State and Federal Document Automation • Email Inbound/Out Bound, Self Service Portals, SMS Integration. • Task Automation, Start Date, Return to Work Processes • Fully Customizable Letters • Automatic Notification to Managers • Payroll Task Automation
Accommodation	<ul style="list-style-type: none"> • Receive ADA Request • Capture Restrictions, Dr. Note • Record Interactive Process • Get Supervisor Approval • Convey Job Duties and Accommodation Agreement
Pay Schedule Management	<ul style="list-style-type: none"> • Manage pay schedule for disability or state sponsored leave programs
Case Management	<ul style="list-style-type: none"> • Manage entire case lifecycle across multiple processes

Users

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Storage
Pulpstream offers unlimited storage

Support

Support is included in the license subscription price mentioned below and there is no extra or hidden cost:

- 24x7x365 Support

Fully Managed Compliance

Pulpstream has internal team of leave experts who continuously monitor state and federal rules and keep our platform in compliant state for all forms and leave parameters.

Pulpstream has partnered with one of the most prominent Leave Law Expertise firm "Littler Law" to get compliance advice, leave laws, and documentation.



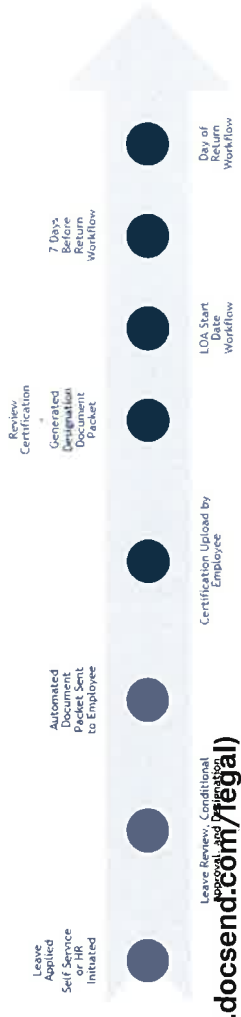
Fueled by ingenuity. Inspired by you.

Pulpstream also partners with Compliance HR to get policy updates



Every Milestone Automated

The platform is designed to automate every milestone in leave management process



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Key LOA Feature

Feature	Availability
Federal Leave Tracking	Yes
State Leave Tracking	Yes
Company Specific Leaves	Yes
Automated Reminders	Yes
Start Date Automation	Yes
Return Date Automation	Yes
Certification Tracking	Yes
Outbound Email	Yes
Reports & Dashboards	Yes
Custom Reports	Yes
Audit Log	Yes
Email Open and Bounce Tracking	Yes
Custom Fields	Unlimited
Notes	Yes
Attachments	Unlimited
Exhaust Date Automation	Yes
Customizable Leave Letters	Yes
Integrated Text Messaging	Yes
Fully Managed Federal and State Document Library	Yes
Document Automation	Yes
Return to Work Process (RTW Certification, Delay in Return)	Yes
Employee Leave Request Form	Yes
Inbound Email	Yes
Intermittent Time Off Tracking	Yes
Leave Designation Guidance Engine	Yes
12/24 Month Rolling Balance Tracking	Yes
Automated Intermittent Verification	Yes
Single Sign On Using Azure, One Login, Okta	Yes

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Service Description	Description	Highly Competitive Pricing	Implementation
LOA Process Automation	Automate the entire LOA process from request to closure – Continuous and Intermittent. Comprehensive Case Management	\$4.75 PEPM 500 Min Employees	\$5,000
HRIS to Pulpstream Integration for Demographics and Time off	FTP/API based integration to send data to Pulpstream at set frequency or real time – One way integration	Included	\$0
HR Users	HR Users for managing LOA <i>10 Users Included</i> <i>Additional Users at \$25/user/month</i>	\$0	\$0

Optional Modules

Accommodation Process for all reasons	Automate the entire accommodation process from request to closure. Capture the entire interactive process and manage documentation.	\$0.15 PEPM	\$0
Employee Self Service Portal	Allow employees to check their eligibility, tasks, LOA and Intermittent Hours as well as Accommodations. AI Driven (Chat GPT) System to find appropriate eligibility and guidance (Q4 2023) <i>This module is not required for employees to submit leaves from web and upload documents</i>	\$0.10 PEPM	\$0
Inbound/Outbound Fax Integration	Receive incoming employee documents in email or fax directly into Pulpstream. No integration with company's IT infrastructure required. Setup legally inbound email and fax number.	\$0.05 PEPM	\$0

LOA Features Description

Pulpstream is a 100% customizable process driven platform to automate any business process. Pulpstream provides out of box LOA Management modules to digitally transform the process and gain compliance and operational efficiency.

Here are the key features of our platform:

Leave Initiation

Leave can be initiated using following mechanisms:

- Visit a URL such as [this](#)
- Call Benefits, Benefits will create request on behalf of the employee.

Leave Process Kickoff

- Verify employee ID and Names against HRIS Information.
- Trigger Review Process
- Assign Task to Benefits Team Members.
 - Task can be assigned to a single benefit team member or to a pool of people
 - Task can also be assigned based on employee location and any other characteristics such as geolocation.
- Send Email Notification to Task Owner
- Monitor deadline and send reminder
- Escalate if compliance deadline is just a few hours away.
- Send text reminders

Leave Designation and Document Generation

- Support for FML leave laws
- Fully managed repository of all letters and forms
- Support for company specific leave
- Supports a guided review process to empower benefits team members
- Pulpstream uses a powerful rule engine to find the eligibility based on various conditions.
- Rule driven Recommendation engine that provides multiple leave options based on eligibility.
- Rule driven Recommendation engine that provides multiple letter packages based on eligibility. Pulpstream uses a document generator that generate Letters from the template, and enclose required documents based on various conditions.
- Capability to override recommendation and allow leaves to be taken based on compassionate grounds.
- Capability to add a personalized message to the automatically generated standard letters.
- Capability to assign the Certificate or any document that needs to be submitted by the Employee based on state and type of leave applied.
- Capability to set Certification Due and reminders dates using a rules engine.

Employee Self Service

- Access to Customizable, Branded Self Portal to access past leaves and leave balances.
- Pulpstream allows the employee to self-upload Certification using the Self-Service portal, Email or SMS.

Receive Reminders related to pending leave related documents

Receive Return to Work Notification 7 days before expected return to work date. Allow employee

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Leave Case Management

- Assigns a case number to every leave
- 365-degree view of every leave: Notes, Emails, SMS messages, Documents, and Tasks related to the leave in one place which brings all team members to same page.
- Ability to communicate with an employee using Email or SMS.
- Send Email from the Case
- Every leave records gets an email address. Allow benefits team to forward the emails received to that address. The email and its attachments becomes part of the case communications history.
- Gives benefits team ability to view the process chart to monitor at what stage the process is.
- Assign Adhoc Tasks related to leave.

First Day of the Leave

- Notifies manager and department admin on the start date
- Automatically updates employee status in HRIS
- Send email notification to payroll as needed

7 Days Before Expected Return

- Notifies employee through email and text that they are expected to be back
- If the leave is a protected leave with balance available, employee has an opportunity to either indicate they are returning on time or request extension
- They would be required to upload appropriate doctors note or certification for either case
- Once they indicate how they are proceeding, and upload appropriate documentation, manager is notified, and task created for HR to review documents.

Day of Return

- Creates a task for benefits team to check if employee has returned
- Benefits can change leave status to employee returned or mark returning delayed
- Upload any certifications
- Automatically notifies employee's manager
- Updates employee status in HRIS

Intermittent Time off Handling:

- Employee takes Intermittent Hours Out before submitting the Certificate. Pulpstream lets benefits approve the Intermittent break with an exception.
- Ability to track the number of intermittent breaks they have taken.
- Ability to monitor if the breaks and hours taken matches with the Certificate provided by the medical provider.

Company Specific Leaves

- Ability to configure company specific leave rules, letter, and forms.
- Automatically generate company specific documents/forms

Compliance

- Fully Managed Compliance by Pulpstream Team
- Centralized State and Federal Forms Repository
- Centrally Managed Leave Parameters
- Centrally managed rule engine

Reports and Dashboards:

- All Leaves data is available to turn into tabular reports and/or chart reports.
- Capability to show the reports as widgets in dashboards for management to monitor all aspects of www.docsend.com/legal
- Control access to leaves using location hierarchy for location managers.

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Schedulers:

- Automatically triggers Certification reminder process based on a pre-defined schedule.
- Automatically sends return to work reminders to employees a few days before the expected return date.
- Changes employee status to On Leave the day leave started.
- Creates a reminder to the benefits team and manager on the day the employee supposed to return.

Exception Handling

- Employee has a task waiting to upload certificate, their healthcare provider faxes the document directly to Benefits. Benefits can upload the document in Pulpstream which will automatically cancel employee task.
- Employee cancels the leave after submitting paperwork. Pulpstream allows leave to be canceled.
- Employee delays the return to work. Pulpstream allows leave to be extended if the employee has enough time to extend.
- Employee comes back with certification after denial is issued, Benefits can restart the review process.
- Employee asks for Intermittent Hours Out before the Intermittent Certification is received and leave is approved, Pulpstream allows Benefits to approve the hours out with an exception.

Multichannel Readiness

- Inbound and Outbound Fax
- Inbound and Outbound Email
- Outbound Text Messages

Platform Security

- SOC1 and SOC2 Certifications
- SSAE70 Certified
- Multi region hosting in Amazon AWS strictly in USA
- Designed and developed in USA

Customizability

- Every Aspect of Pulpstream is 100% customizable.
- Forms, Process Flows, Portal Look and Feel, Branding, Logo, Tasks, Notifications, Letters, Documents, Rules.

Extensibility

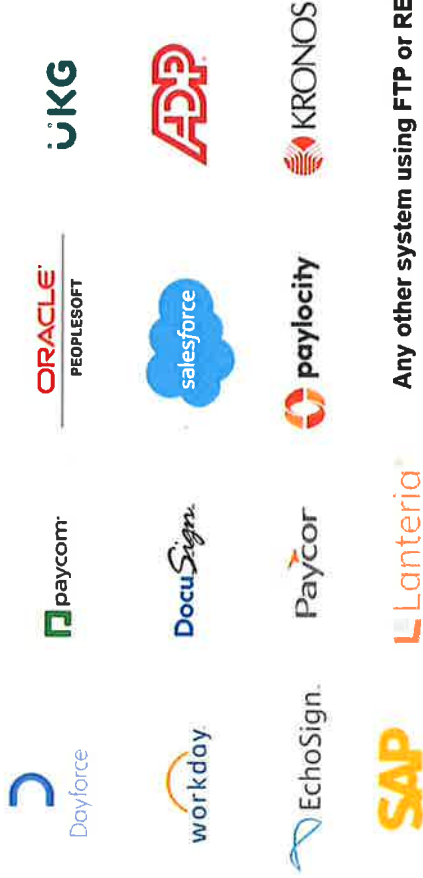
- Once you find success with LOA Process, you can add additional processes into the platform and take the next step in your digital transformation journey.

Integration with HRIS

Pulpstream can integrate with HRIS inbound as well as outbound depending on your investment.

It can:

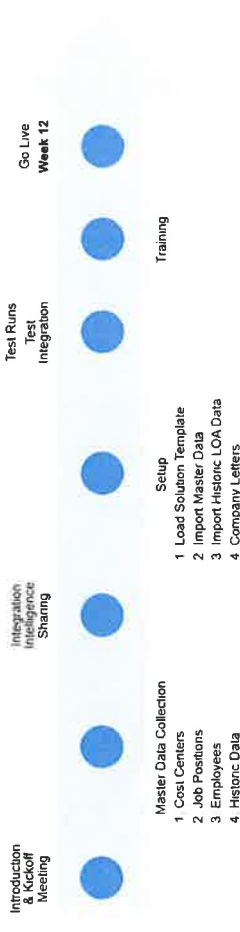
- Receive Employee Demographic File weekly via SFTP from HRIS



Any other system using FTP or REST

Implementation Timeline

Implementation can be from 8 to 12 weeks entirely depending on how responsive your team is on supplying us the information needed in step 2 below.



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Training

Pulpstream provides unlimited trainings both during implementation phase as well as post go live phase. Here is our basic training recommendation

- 4 Days (2 per week) – 1.5 hour each for using Pulpstream
- 2 Day – 1 hour each for using Pulpstream Reports and Dashboards
- 1 Day – 1 hour for using Pulpstream Administration
- Unlimited Ongoing training sessions as needed on reporting and other needs

Postproduction

Pulpstream will provide ongoing white glove support

- Weekly meetings for first 3 months
- Switch to fortnightly after first 3 months
- < 30 minute support response time (Chat driven support system is integrated inside Pulpstream interface). Support can also be reached through email to support@pulpstream.com
- Phone support for urgent assistance
- 24x7x365 availability

Commitment to your success

Pulpstream success is built upon our successful implementations since 2014 with companies in multiple verticals and of various sizes.



Lean on Our White-Glove Service to...



- Re-think and redesign your business processes
- Help navigate compliance and regulation complexities
- Streamline and deploy in record time

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