**This section is scored. (600 total points)**

The purpose of this Technical Questionnaire is to provide ETF and the Board with a basis for determining the Proposer’s capability to undertake the Contract.

All Proposers must respond to the appropriate questions listed below.

* **Proposers who intend to provide a Proposal for a Data Warehouse solution must respond to all questions within the Data Warehouse section below.**
* **Proposers who intend to provide a Proposal for a Visual Business Intelligence solution must respond to all questions within the Visual Business Intelligence section below.**
* **Proposers who intend to provide a Proposal for both a Data Warehouse solution and a Visual Business Intelligence solution must respond to all questions within both the Data Warehouse section and the Visual Business Intelligence section below. Note: there are questions within both sections that are duplicative. Please provide appropriate answers to these duplicate questions for the solution being proposed. *If appropriate*, you may copy and paste the same answer.**

The Proposer must respond to each question/statement by:

1. restating each question or statement in your Proposal
2. provide a detailed written response immediately after each question/statement.
3. provide a point-by-point response to each and every statement or question.

All responses must follow the same numbering system and headings used below, and address each point or sub-point.

The Proposer must be able to, and demonstrate they are able to, perform Services according to the requirements contained in this RFP.

The Proposer must provide sufficient detail for the Board and ETF to understand how the Proposer will comply with each requirement. If the Proposer believes that the Proposer’s qualifications go beyond the minimum requirements or add value, the Proposer should indicate those capabilities in its response.

**Fees related to any services proposed in the Proposal shall not be noted in this section but must be included in the Cost Proposal.**

## **Data Warehouse Questions**

### Account/Identity Management

1. Describe the account management and account recovery process. Include how the solution will provide for secure access for participants in the system. Describe the user registration process, and the association of user accounts to participant information provided by ETF. ETF concerns are to prevent users intentionally or accidently obtaining access to other participant information. Describe how the solution is designed to prevent accidental or incidental access.
2. Explain how passwords and user accounts are managed to protect against unauthorized access to any systems or applications. It will cover at a minimum, the following:  
   2a) Password complexity requirements for all accounts (web portal user accounts, Contractor employee accounts, administrator accounts and service/shared accounts);  
   2b) Onboarding process for employees and contractors; and  
   2c) Off boarding process for employees and contractors.
3. Describe the technical solution and the authentication standards that will be implemented to integrate with any other third party providers.

### Audit & Logging

1. Describe, in detail, your logging and auditing policies and procedures. It will cover at a minimum, the following:  
   4a) Record of who did what and when;  
   4b) Log retention;  
   4c) Logging practices;   
   4d) Syslog or Security Information and Event Management (SIEM);   
   4e) Auditing practices and procedures in each area of technology (web, application, operating system, database);  
   4f) User and administrator auditing;   
   4g) Service or shared account auditing;   
   4h) Audit history reporting practices to clients, such as ETF; and  
   4i) Cooperation practices with clients to do forensics for security incident response situations.

### Analytic Abilities & Integration

1. In-database Analytics: Describe any system analytic or advanced analytic functions that run in-database? Are these provided by the Contractor or a third party? Specify what models are included, and are they provided at an extra cost.
2. Additional claims datasets: Does the product support the ability to integrate other claims data in addition to ETF member claims (e.g. all payer inpatient datasets required by the State of Wisconsin, and managed by WHAIC), and is this ability is provided at an extra cost? Describe your experience implementing non-standard claims data sets.
3. Additional non-claims datasets: Does the product support the ability to integrate other data in addition to ETF member claims (e.g. ETF member HRA results, ETF member EHR/EMR data, on-site clinic clinical results data for ETF members (e.g. flu shots), functional/clinical screen results), and is this ability is provided at an extra cost? Describe your experience implementing non-claims data sets.

### Application Support, Integration & Ability

1. Visual Business Intelligence (VBI) Tools: How does the system integrate with VBI tools? List any third-party Contractor partnerships and any tool integrations. Describe the seamless of the tool integration.
2. Data Integration Tools: Does the system integrate with common data integration and ETL tools? List certified third-party integrations. Describe the Contractor's ETL tools, methods and processes.

### Architecture, Administration, & Manageability

1. Metadata Management: Describe your healthcare metadata management strategy and implementation.
2. Standardized Transformations: Describe the system, support and ability to create data transformations for all levels of complexity, including custom transformations and extending standardized transformations. Include how transformations are implemented, what is available in your standard product, is the capability implemented by a third party or through a purchased product, or automated by the Contractor.
3. Referential integrity: Describe how your system employs referential integrity constraints in a typical or standard implementation. Include these metrics: number of tables, number of referential integrity constraints implemented in the database. If another mechanism is used to enforce referential integrity, describe it.
4. Standards-based connectivity: What direct access to the database will be supported and allowed? What database clients will be supported? Include in your description query tools, JDBC support, ODBC support, BI client tools, etc. Are there any proprietary database client tools that use non-standard protocols?
5. Backup and Recovery: Describe the tools and capabilities implemented in your system to accomplish backup and recovery of the database. The Contractor explanation shall include, but should not be limited to, the following:   
   14a) Full backup/restore of entire database.  
   14b) Incremental backup/restore.  
   14c) Table backup/restore.  
   14d) List and describe any limitations.  
   If stored procedures are employed in your implementation, describe how backup/restore processes take stored procedures into account.
6. Warm/Cold DR: Describe your Disaster Recovery strategy and tools?
7. Virtualization: Software Hypervisors: Describe how you leverage virtualization in your system. List and explain any limitations.
8. Data Warehouse Model: How will you make the data warehouse understandable, accessible and useable by ETF and business partners. We are interested in the tools you will use to generate and maintain documentation, and examples of that documentation.
9. High Level Architecture: Describe the high level architecture for the solution, supported with diagrams depicting the interactions among the system components. The purpose of these diagrams is to ensure that ETF understands the essential design of the proposed solution and can determine that the design is generally consistent with the budget, scope, and capabilities represented in this RFP. Diagrams will include architectural views that reflect the application architecture, information architecture and related high level data models, and corresponding software and hardware architectures. Include environments, i.e., production, test and user acceptence, highlighting difference between environments.
10. Application Architecture: Describe the particular industry standards that are incorporated in the application architecture. If proprietary standards or interfaces are used, include the rationale and describe the advantage over current industry standards. Decompose your system into its system components, list them, and tell us how they work.
11. Web Architecture: Describe the standard web technologies, frameworks and software platforms adopted in the development of the web user interface (e.g. JQuery, JavaScript, PHP, Ajax, Python, C#, Java, .Net).
12. SDLC Architecture: Describe the Software Development Life Cycle (SDLC) process used in the development of the system. Describe how you promote from development through the environments and to production.
13. Application Security: Describe how the SDLC incorporates the application security principles outlined by OWASP (http://www.owasp.org), also include how the system is protected against common web application vulnerabilities which include but not limited to Cross-site scripting (XSS), SQL injection, CSRF (Cross-site request forgery), and remote code execution.
14. Scalable Architecture: Explain how the Contractor system can scale to meet potential client needs? If a hosting service or subcontractor are relied upon to scale the system to meet demand, include that information. Describe any limitations.
15. Performance Optimization: Describe architectural decisions or tool choices that optimize your system for performance. Include any concerns or performance bottlenecks in the response.

### Deployment & Delivery

1. Describe how you would provide integration, data, and support to an independent, third party BI vendor.
2. Cloud-based solution: Describe if and how the product provides for a cloud-based solution?

### Functional

1. Describe the Contractor system's ability to back out a modification from Production if there is a problem with the changes. Describe how the back out occurs. If stored procedures are employed, indicate how backing out a version of the stored procedure without losing data is accomplished, and how reverting the data in the database without affecting deployed stored procedures is accomplished.
2. Describe the Contractor system's ability to store named database connections with the username, password (secure and encrypted), and connect string allowing a smooth migration among environments without changes?
3. Describe the Contractor system's ability to run standard and custom reports for validating data lineage, mappings, data dependency analysis, data-store structures, users, and documentation; browse, and explore database and other metadata.
4. Describe the Contractor system's ability for error detection and data corrections. Describe how the functionality works.

### Hosting

1. Infrastructure: Provide a detailed description of the hardware, software, communication mediums, and other infrastructure necessary to support the information technology requirements for the Contract, excluding any features not included in the cost proposal.
2. Infrastructure Security: Describe the physical security safeguards enforced at the private hosted datacenter or datacenters hosted by a third party cloud provider.
3. Describe in detail how the network is architected to secure the data and thwart unwanted/unknown access to the applications or systems. It will cover at a minimum, the following:  
   33a) Overview of network access control;  
   33b) Network access controls for administrator access;  
   33c) Security devices used to protect the infrastructure;  
   33d) Change control processes for all systems;  
   33e) Security updates and patch management for all systems;  
   33f) Host-based firewall and anti-malware protection;  
   33g) Explanation of how much of the infrastructure/systems is owned and managed by the Contractor and if it’s hosted, how much control the Contractor has or does not have to change the configuration on each system (servers, switches, routers, firewalls, SIEM, Intrusion Protection Systems (IPS), Intrusion Detection System (IDS), etc.);  
   33h) Encryption between systems and any Public Key Infrastructure (PKI); and  
   33i) Internal Wireless and wired networks, whether remote or directly connected, that has privileged network access to the infrastructure or systems that house the applications used to provide the web portal.

### Implementation & System Support

1. What is the range and average for system downtime (scheduled and unscheduled) for your clients’ systems on an annual basis?
2. What is the length of time, in calendar days, required to get your application into initial production? What steps did you take to minimize installation time, and maximize the quality of the product?
3. Who performs the implementation? Describe the staff, consultants, partners or subcontractors who perform the implementation, and list by title/function, the number of staff, consultants, partners or subcontractors that are part of a recommended implementation team.
4. Describe the Contractor ability to minimize the span between when an organization gets data or data access, and when the right person can use it to achieve actionable insights?
5. Describe your ability and willingness to partner with ETF to complete and demonstrate a verifiable proof of concept or pilot for ETF's DW-VBI solution based on ETF's criteria.
6. What are your time frame recommendations for each stage of this project implementation? Attach your standard implementation plan and resource estimates for all phases of the process.
7. What are your post-implementation support services? Describe in detail and include any inclusions/exclusions?
8. What is your standard availability for customer support (specify by geographic region)?
9. What is your preferred method of contact for customer support (phone call, e-mail, etc.)?
10. Where are your customer support staff members located (list city, state, country for all locations)?
11. How are after hours and emergency supports handled? What is your definition of an emergency to obtain emergency support?
12. Problem/Resolution Process: What is the average time to resolve support tickets/calls by severity level?
13. Problem/Resolution Process: Describe your system support escalation process and procedures.
14. Explain how the installation of upgrades affects software and/or application operations?
15. Explain your support policy for older software or application releases?
16. List any scheduled or planned enhancements or upgrades with expected release dates. Describe if this list of upgrades includes regulatory requirement changes? Describe how regulatory requirement changes affect the frequency of upgrade releases?
17. Explain if customization is automatically included in upgrades, and does customization incur additional maintenance and other costs?
18. Describe the process and estimate the time required to install subsequent releases/versions of your product.

### Industry Expertise & Vision of Technology

1. What is your vision for this product for the next 1-3 years. Please describe any functional or technical architecture changes. Will these changes affect user functionality? If yes, please describe the changes, and how will they be incorporated into your upgrade/modification plan?
2. What are three dominant trends in your sector, and how do you envision incorporating these trends into your products?

### Matching/Relationship Identification

1. Machine-learning matching approaches: Does the system support packaged machine-learning algorithms and techniques to automate sophisticated matching out of the box? Describe.
2. Other matching approaches: Is the system capable of any other types of matching algorithms? Describe the types of algorithms.
3. Entity resolution/merging: Describe the facilities for implementing and customizing rules by which duplicate or related records can be merged into a single "survivor"?
4. Data masking: Describe how the system supports the ability to switch on/off data masking of records so that the Contractor and ETF are able to address data quality issues without compromising privacy and data security rules? Describe.

### Security

1. Can audit and access be controlled at the object level (e.g. at the table, row, and column level) for end-users? Describe how this is achieved and if there is any additional costs for each level of security?
2. Describe how the system supports the masking of sensitive or personally identifying information (e.g. PHI or PII)? If supported, what options or flexibility are supported?
3. Describe the Contractor system's ability to assign administration and manage end-user authorization and security profiles. Describe the Contractor process and operations for administration of user security and access across DSE's. Further describe your practices and methods for how this role is or should be defined and managed across multiple Contractors and DSE's?

### Vulnerability Management & Penetration Testing

1. Explain your vulnerability management program and penetration testing practices and procedures. It will cover at a minimum, the following:  
   61a) Vulnerability scanning practices;  
   61b) Vulnerability scanner tools;  
   61c) Remediation practices;  
   61d) Vulnerability reporting policy and practices to clients, such as ETF;  
   61e) Penetration testing practices;  
   61f) Depth of the penetrating tests, such as, how much is done (social engineering, password cracking, Denial of Service (DOS), etc.); and  
   61g) Penetration testing reporting policy and practices to clients, such as ETF.

### Warranty, Pricing, License, Training & Support

1. What types of training do you usually offer to your clients, and at what cost? Identify your scores and rating scale for your top five client customer satisfaction training surveys.
2. Describe your ability to lock-in or provide price discounts, and for what length of time? Specify any discounts and the conditions where discounts apply.
3. Describe any support and licenses needed for virtualized server environments?
4. Do you support credit for unused software, applications, or services?
5. Describe your software and application warranties, including all conditions, criteria, recourses, inclusions and exclusions?
6. Describe any warranties offered for any other services and products, and at what cost?
7. Explain the pricing model for your product line(s)? Is there a separate or additional cost for Development, UAT, QA or other system regions?
8. What are your maintenance prices and contract types? Indicate if future product upgrades are included in the base purchase price of the product? If not, provide the pricing model.
9. What types of consulting do you offer, and how many hours are included in a standard contract, and at what cost?
10. Security Training: Explain your policies and procedures for user security awareness training for all their staff. It will cover at a minimum, the following:  
    71a) Programs used to train employees and content of the programs;  
    71b) How often trainings occur; and  
    71c) Any processes used to validate that employees are retaining what they learned.

## **Visual Business Intelligence Questions**

### Account/Identity Management

1. Describe the account management and account recovery process. Include how the solution will provide for secure access for participants in the system. Describe the user registration process, and the association of user accounts to participant information provided by ETF. ETF concerns are to prevent users intentionally or accidently obtaining access to other participant information. Describe how the solution is designed to prevent accidental or incidental access.
2. Explain how passwords and user accounts are managed to protect against unauthorized access to any systems or applications. It will cover at a minimum, the following:  
   2a) Password complexity requirements for all accounts (web portal user accounts, Contractor employee accounts, administrator accounts and service/shared accounts);  
   2b) Onboarding process for employees and contractors; and  
   2c) Off boarding process for employees and contractors.
3. Describe the technical solution and the authentication standards that will be implemented to integrate with any other third party providers.

### Administration & Scalability

1. Objects Reuse: Describe how the system provides for storage and reuse of visualizations components. Include graphical elements, metrics, dimensions, parameterizations and custom groups?
2. Audit, Archive & Logs: Explain how the product supports audit tracing, security logs and monitoring?
3. Visualization: Describe your support for interactive visualizations?
4. Users Scalability: How do system resource requirements grow with the number of concurrent and/or total users?
5. Data Volume Scalability: Specify how the product scales to handle large data volumes?
6. Performance Optimization: Describe the mechanism by which response times, throughput, and query run times are optimized in your system for performance.
7. Third-Party Applications: List and explain any applications used in your system and developed with or by other organizations. Include partner-developed and third-party applications. Describe their uses and supported capabilities within the prime Contract system context, and identify which are partner-developed and which are third-party.

### Analysis, Geospatial Analysis, & Visualization

1. Predictive/Prescriptive Analytics: Describe how the system supports predictive analytic capabilities (e.g. integration with predictive analytics either natively or with a Contractor partner)? Does the predictive analysis capabilities support a machine learning algorithm(s), prescriptive analytics, and/or personalization capabilities? Are there multiple risk scores available (e.g., retrospective, prospective, etc.)? Describe what risk scoring methods the Contractor has available, and how the risk scores are assigned? Does your organization own the predictive science embedded within its tools or do you license it from a third party?  Describe these supporting abilities and methods.
2. Real-Time Detection: Explain the product ability to detect real-time changes in data based on applied business rules, or receive or send alerts based on data events?
3. Population Health Management: Describe the Contractor standard and custom reports/analysis for managing population health care related costs, utilization and quality? Include representative methods and examples of approaches the Contractor supports and is engaged in with clients.
4. Payment Strategies: Describe the Contractor ability to support and recommend health care related risk-based payment strategies tailored to market dynamics, readiness, and resources?
5. Care Transformation: Describe the Contractor ability to model the impact of health care transformation initiatives on risk contract yield and reimbursement, and support risk contract negotiations through financial analysis.
6. ROI: Describe the Contractor experience and ability to support health care business impact and Return on Investment (ROI) analytics, and the process, method(s) or model(s) used?
7. Billing Errors: Explain if and how the product supports the ability to identify medical and Rx claim billing errors, and/or other suspected payment errors? Include any support for upcoding detection in the description, and the methods used?
8. Information Layering: Explain if and how the product allows for information display on top of a background image or map?
9. Geographic Drilldown: Describe the product support for data drill-down and/or drill-through of datasets represented in maps? Does the product allow users to drill on geographic data elements or visual features (e.g. from County to City to Zip code levels)?
10. Geospatial Data Integration: Describe if and how the system supports integration with Geographic Information Systems (GIS), and/or external data sources?
11. Advanced Geospatial Analysis: Describe how the system supports advanced geospatial location visual analytics? Does the system support specialized geospatial algorithms, and layering of geospatial data on custom maps, heat maps, temporal maps, clustering, and related visualizations?
12. Advanced Visualizations: Describe the system's advanced visualizations and charting abilities in detail?
13. Dimensional Rendering: Describe the system's ability to project multi-dimensional data attributes onto a two-dimensional image?
14. Visual Linking: Explain how the system supports chart linking? Include in your response an explanation of the ability to present multiple aspects on the same dataset at the same time in linked visual objects?
15. Formatting: Describe how the system supports the color-coded summary of the state of a particular metric compared to a goal or threshold target, without programming?
16. Animation: Explain if and how the motion of gauges, lines and other visualizations can be demonstrated from live data feeds using the system? Describe the system support for animation playback (e.g. the ability to display trends and timelines via the use of animated charts)?

### Audit & Logging

1. Describe, in detail, your logging and auditing policies and procedures. It will cover at a minimum, the following:  
   27a) Record of who did what and when;  
   27b) Log retention;  
   27c) Logging practices;   
   27d) Syslog or Security Information and Event Management (SIEM);   
   27e) Auditing practices and procedures in each area of technology (web, application, operating system, database);  
   27f) User and administrator auditing;   
   27g) Service or shared account auditing;   
   27h) Audit history reporting practices to clients, such as ETF; and  
   27i) Cooperation practices with clients to do forensics for security incident response situations.

### Authoring, Interactivity, & User Experience

1. Data Mashup: Describe the system ability to perform data mashups across multiple data sources? Can users combine data elements from different sources to create calculated fields?
2. Data Authoring: Explain the user ability to create, edit and store metrics and dimensions? Are users able to create, edit and store hierarchies and groups of data elements?
3. Mobile and Web Authoring: Describe system support for data authoring or designing with mobile and/or web-based tools or devices?
4. Visual Representation Selection: Describe if and how users instantly replace one visual information representation with another, and include any system support to preserve user selections?
5. Zooming and Panning: Explain if and how the system supports panning across multiple visualizations or charts that are larger than accommodated by the screen real estate? Does it allow users to zoom into (and out of) visualizations and maps?
6. Brushing: Describe if and how the system supports brushing or the ability to filter directly on a graph by clicking on objects, and drawing a "circle" around the desired object?
7. Ease of Use: Explain in detail how non-technical end-users learn to use the system without formal training?
8. Wizards: Describe if and how the system supports wizards to execute activities (e.g. data import), and is able to suggest actions to perform or options to select (e.g. best fit charts or visualizations), based on user behavior, context and/or selected data content? Include any system support for code-free methods for users to connect to data sources and automate data-loading processes in the explanation.
9. User Preference Saving: Describe how the system supports end-users to save and reuse preferences (e.g. visualization modes and filters) when a report is reopened?

### Data Access

1. Data Sources Connectors: Describe how the system supports a broad range of connectors and/or access to data sources? Include in your response data source connections, protocols, restful and other API's, web services, etc.
2. Data Enrichment: Explain the system support for data inferencing and enrichment (e.g. the addition of city, state and county to a zip code, or quarter and month to a date)?
3. Data Lineage: Describe the system supports for data lineage capabilities? Explain the data lineage capabilities for both end-user data mashup methods and/or other models?

### Deployment & Delivery

1. Embedded Delivery: Explain the ability of the product to be embedded in third-party applications?
2. Scheduled Distribution: Describe if and how the system supports scheduled distribution capabilities, and can end-users subscribe to content?
3. Access and Collaboration: Describe any system support for end users to create, share, access, co-author, consume, and interact with content on desktop and mobile devices.
4. Mobile Consumption: Describe if and how the product provides native and Web-based mobile access to visualizations? Does the product support mobile devices from the major systems: Apple iOS, Google Android, and Microsoft Windows?

### Functional

1. Describe the Contractor system's ability to store named database connections with the username, password (secure and encrypted), and connect string allowing a smooth migration among environments without changes?
2. Describe the Contractor system's ability to run standard and custom reports for validating data lineage, mappings, data dependency analysis, data-store structures, users, and documentation; browse, and explore database and other metadata.
3. Describe the Contractor system's ability for error detection and data corrections. Describe how the functionality works.

### Implementation & System Support

1. What is the length of time, in calendar days, required to get your application into initial production? What steps did you take to minimize installation time, and maximize the quality of the product?
2. Who performs the implementation? Describe the staff, consultants, partners or subcontractors who perform the implementation, and list by title/function, the number of staff, consultants, partners or subcontractors that are part of a recommended implementation team.
3. Describe the Contractor ability to minimize the span between when an organization gets data or data access, and when the right person can use it to achieve actionable insights?
4. Describe your ability and willingness to partner with ETF to complete and demonstrate a verifiable proof of concept or pilot for ETF's DW-VBI solution based on ETF's criteria.
5. What are your time frame recommendations for each stage of this project implementation? Attach your standard implementation plan and resource estimates for all phases of the process.
6. What are your post-implementation support services? Describe in detail and include any inclusions/exclusions?
7. What is your standard availability for customer support (specify by geographic region)?
8. What is your preferred method of contact for customer support (phone call, e-mail, etc.)?
9. Where are your customer support staff members located (list city, state, country for all locations)?
10. How are after hours and emergency supports handled? What is your definition of an emergency to obtain emergency support?
11. Problem/Resolution Process: What is the average time to resolve support tickets/calls by severity level?
12. Problem/Resolution Process: Describe your system support escalation process and procedures.
13. Explain how the installation of upgrades affects software and/or application operations?
14. Explain your support policy for older software or application releases?
15. List any scheduled or planned enhancements or upgrades with expected release dates. Describe if this list of upgrades includes regulatory requirement changes? Describe how regulatory requirement changes affect the frequency of upgrade releases?
16. Explain if customization is automatically included in upgrades, and does customization incur additional maintenance and other costs?
17. Describe the process and estimate the time required to install subsequent releases/versions of your product.

### Industry Expertise & Vision of Technology

1. What is your vision for this product for the next 1-3 years. Please describe any functional or technical architecture changes. Will these changes affect user functionality? If yes, please describe the changes, and how will they be incorporated into your upgrade/modification plan?
2. What are three dominant trends in your sector, and how do you envision incorporating these trends into your products?

### Security

1. Can audit and access be controlled at the object level (e.g. at the table, row, and column level) for end-users? Describe how this is achieved and if there is any additional costs for each level of security?
2. Describe how the system supports the masking of sensitive or personally identifying information (e.g. PHI or PII)? If supported, what options or flexibility are supported?
3. Describe the Contractor system's ability to assign administration and manage end-user authorization and security profiles. Describe the Contractor process and operations for administration of user security and access across DSE's. Further describe your practices and methods for how this role is or should be defined and managed across multiple Contractors and DSE's?

### Vulnerability Management & Penetration Testing

1. Explain your vulnerability management program and penetration testing practices and procedures. It will cover at a minimum, the following:  
   69a) Vulnerability scanning practices;  
   69b) Vulnerability scanner tools;  
   69c) Remediation practices;  
   69d) Vulnerability reporting policy and practices to clients, such as ETF;  
   69e) Penetration testing practices;  
   69f) Depth of the penetrating tests, such as, how much is done (social engineering, password cracking, Denial of Service (DOS), etc.); and  
   69g) Penetration testing reporting policy and practices to clients, such as ETF.

### Warranty, Pricing, License, Training & Support

1. What types of training do you usually offer to your clients, and at what cost? Identify your scores and rating scale for your top five client customer satisfaction training surveys.
2. Describe your ability to lock-in or provide price discounts, and for what length of time? Specify any discounts and the conditions where discounts apply.
3. Describe any support and licenses needed for virtualized server environments?
4. Do you support credit for unused software, applications, or services?
5. Describe your software and application warranties, including all conditions, criteria, recourses, inclusions and exclusions?
6. Describe any warranties offered for any other services and products, and at what cost?
7. Explain the pricing model for your product line(s)? Is there a separate or additional cost for Development, UAT, QA or other system regions?
8. What are your maintenance prices and contract types? Indicate if future product upgrades are included in the base purchase price of the product? If not, provide the pricing model.
9. What types of consulting do you offer, and how many hours are included in a standard contract, and at what cost?
10. Security Training: Explain your policies and procedures for user security awareness training for all their staff. It will cover at a minimum, the following:  
    79a) Programs used to train employees and content of the programs;  
    79b) How often trainings occur; and  
    79c) Any processes used to validate that employees are retaining what they learned.