

Statement of Work
E-Forms Business Process Analysis Consulting Services

CCR/WO #: FFSR-<XX>-<XXXX.00>



Department of [XXX]
Division/Unit: [XXX]

*This document is an example of the Statement of Work Template
for the E-Forms Business Process Analysis Consulting Services.
Each Statement of Work will be customized for an Agency's specific needs.*

Section 1 E-Forms Business Process Analysis Consulting Services Overview

1.1 Workshop Description

Forms Factory offers a customizable combination of services that can be used to meet an agency's specific business needs. The Business Process Analysis Consulting Services for e-forms is intended for agencies that want to assess the optimal method of integrating an e-forms solution with specific business processes.

This consulting workshop can be customized to the level of detail that the agency desires. For example, an agency can request a specific type of analysis — process improvement, process renewal or overhaul, process standardization, development of a new process, integration of multiple processes within the same business line, or integration of multiple processes across many business lines. Experienced Forms Factory business analysts will work with agency business staff to determine the best way to meet the needs of the processes the agency wishes to examine.

The analysis would cover the areas below, as applicable:

- E-form user experience
- Agency staff experience processing submitted e-forms
- Workflow process analysis
- Evaluation of potential adjunct business processes (e.g., processing electronic payments via e-form)
- E-forms and paper forms coordination
- Attestations
- Electronic signatures and approvals
- Return on investment (ROI) analysis

For a detailed description of these topics, please see Section 2.

This consulting service is intended to address the goals and e-forms implementation strategy of the agency through a combination of the following:

- A structured and highly interactive educational seminar
- A series of interactive meetings
- Brainstorming sessions
- High-level and detailed business process discussions
- Business process report development

For the business process analysis to be successful, the agency participants must be able to address the agency's vision of the e-form implementation and be very familiar with agency business processes. It is also important that agency participants have a clear understanding of the targeted e-form users and agency staff who will process the submitted e-forms. The agency must also identify the form processors and solicit their participation in the analysis, particularly if an ROI analysis is being completed.

Section 2 E-Forms Business Process Analysis Consulting Services Topics

An agency can choose from the following workshop topics detailed in this section. If an agency has a specific need outside or in addition to the topics presented, a Forms Factory consultant can work with the agency to deliver a workshop targeted to the agency's need.

2.1 E-Form User Experience

One of the most important qualities of an e-form is its ability to deliver a user experience that is straightforward and painless. This workshop topic area focuses on the components of a successful e-form and how to integrate electronic forms best practices into a proposed e-form project.

2.2 Processing Submitted E-Forms

The agency's business process will determine the most efficient way to incorporate the submission of e-forms and e-form data. This workshop will cover a variety of methods for extracting data from an e-form and how best to integrate that data with agency systems. Form routing and levels of authorization can be also included as discussion points.

Pre-population of data within an e-form can also be addressed, for example, using a user's unique identification number to fill the form with current contact information from an agency's database. The extent of data integration can also be discussed, for example, a TurboTax-style panelized interview form that makes repeated calls back to a server to present form users with questions based on logic branches.

A Forms Factory analyst will work with agency staff to determine the "best fit" method for submitting e-forms within the agency's current (or proposed) business process.

2.3 Workflow Process Analysis

Each of the following workflow process analysis topics can be presented as a standalone workshop or integrated into a customized offering based on an agency's need.

With each of these workshops, workflow diagrams and process charts will be used to identify opportunities for improvement and possible areas to streamline. Depending on the state of the current business process documentation, agencies can be guided through development of both current and proposed business process diagrams.

2.3.1 Process Improvement

This workshop focuses on examining an agency's current business process with an eye toward improving the process by implementing an e-form or multiple e-forms. E-forms can be designed to streamline existing workflows or replace process steps altogether. This workshop topic area will provide agency staff with an understanding of the benefits offered by an e-form customized for the agency's business process.

2.3.2 Process Renewal or Overhaul

When an agency determines the need for a complete overhaul of one of its business processes, a Forms Factory business analyst can guide agency staff in understanding the flow of information and how best to obtain valid data from the e-form that interfaces with the renewed business process. Key factors for success include studying the relationships between individual tasks and forms, determining where problems are occurring, and identifying which process steps can be combined for maximum efficiency.

2.3.3 Process Standardization

This workshop focuses on standardizing business processes for data that is gathered in multiple formats. For example, data might currently be gathered by a webform, a paper form, an e-form or a telephone interview. A Forms Factory analyst process standardization across multiple data collection methods.

2.3.4 Development of a New Process

In many cases, the flexibility and robust nature of an e-form will spur the creation of an entirely new business process. This workshop topic deals with the desired process an e-form should follow and identifying what business and technology components would best serve the desired process outcomes. In this offering, focusing on the outcomes is a key success criterion; the desired process should fulfill the needs of all identified constituents — e-form users, processors, and data requirements.

2.3.5 Integration of Multiple Processes Within the Same Business Line

An agency may have a need to combine multiple processes within the same line of business. This workshop deals with how to best approach this integration from both the business and technical aspects of implementing an e-form solution. Participation from agency business and technical staff is critical for success. The business process analysis resulting from discussions with participants and examination of current process documentation will assist in identifying the agency's state of readiness for the desired e-form implementation. This analysis can also explore alternate workflow scenarios varying from partial data automation to full two-way data integration with agency systems.

2.3.6 Integration of Multiple Processes Across Many Business Lines

This workshop expands on the business process analysis offered for the integration of multiple processes within the same business line by applying the same analytic principles to additional lines of business that the e-form or its data can affect.

For example, an agency might wish to focus on combining multiple forms to collect and distribute accurate form data for multiple departments. Each step that the information takes — from e-form user to e-form processor to data processor to archiving — will be considered against desired business process outcomes. With this offering, a formalized plan for data collection could be developed if the agency so desires.

2.3.7 Evaluation of Adjunct Business Processes

Adjunct business processes are often impacted when an agency chooses to implement e-forms. The most common process affected by an e-form implementation project is the processing of electronic payments. This workshop can be tailored to help the agency identify the most appropriate and secure methods for obtaining electronic payments via e-forms and how to integrate the various business processes from the participating business departments. Other adjunct processes can be explored as well.

2.3.8 E-Forms and Paper Forms Coordination

This workshop looks at how an agency can collect data via both e-forms and paper forms that follow similar business processes. For example, barcoding is a very common solution for coordinating and standardizing the processing of electronic and printed form data. Optical character recognition (OCR) processing is another method of obtaining hardcopy data. This offering explores the needs of the agencies in order to match a solution with desired business process outcomes.

2.3.9 Attestations

Business processes often call for an attestation given by the form user. This workshop area explores the various methods of procuring an attestation (for example, required checkboxes accompanied by a digital signature on an e-form) while simultaneously considering the level of authority and security required by the business process.

2.3.10 Electronic Signatures and Approvals

This workshop topic explains the differences between electronic signatures, digital signatures and digital certificates and the security considerations inherent with each. A Forms Factory analyst will examine what form of authorization makes the most sense based on the business process analysis results of either the current or desired e-form process.

2.3.11 Return on Investment (ROI) Analysis

Most of the business process analysis consulting workshops will include some aspect of ROI analysis. To obtain a successful analysis, the agency must identify the form processors and solicit their participation in the workshop. The agency will need to gather data that quantifies time, materials, and services utilized within a specific business process. A Forms Factory analyst will then compile the results and produce a report that could include the following areas, depending on what the agency wishes to focus on:

- Labor costs — staff rates for processing forms, time spent for form churn from bad data, time spent responding directly to constituent questions re: form
- Material costs — paper, printing, distribution, storage
- Infrastructure costs — hardware, software, technical support

Each of the topics above can be covered for the current business process, and can be revisited once an e-form solution has been implemented to compare savings.

Section 3 Signature Page

EDS/E-government will provide the agency with the management and consulting services described in this Statement of Work. This Statement of Work shall be subject to the terms and conditions of E-government and the Agency Agreements, as applicable. Each of the signatories agrees that the complete agreement between the parties about these services consists of (1) this Statement of Work and (2) the E-government and the Agency Agreement.

Department of [XXX]

Oregon E-government Program

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