



NEW MEXICO HEALTH CARE AUTHORITY

STATEMENT OF WORK

**SALESFORCE INTEGRATION FOR
EXPORTING CONTENT TO ONBASE
PHASE 2 OF ORIGINAL PROJECT**

JUNE 25, 2025



DataBank
A KYOCERA GROUP COMPANY

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VERSION CONTROL

Document Attributes

Document Name	Statement of Work
Document Identifier	20250402_New Mexico Health Care Authority_Salesforce Integration for Exporting Content to OnBase Phase 2_SOW
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Version History

Version Number	Date	Responsibility (Author)	Description
0.1	4/4/2025	Brian Wienclaw	Initial draft 2ND Phase is only Training, Production Deployment, and Project Management.
0.2	6/25/2025	Brian Wienclaw	2ND Phase is Testing, Training, Production Deployment, and Project Management.

RACI Chart

Name	Position	*	R	A	S	C	I
Lee Meyerdirk	DataBank - Public Sector Practice Director	X		X	X		X
Jeff Eveland	DataBank – Vice President of Services			X	X		X
Scott McLean	DataBank – Director of Development				X		X
Kendra Deutsch	DataBank - Director of Professional Services - Public Sector				X		X
Brian Wienclaw	DataBank - Proposal Specialist		X				X
Glenn Walther	DataBank - Business Development Director (IBR)				X		X
Carlos Moya	New Mexico Health Care Authority - Project Sponsor	X				X	X
Column Key	* – Authorize: This individual has ultimate signing authority for any changes to the document and will be responsible for signing the Master Agreement R – Responsible: Person responsible for creating this document. A – Accountable: Person accountable for accuracy of this document. S – Supports: Individuals providing supporting services in the production of this document. C – Consulted: Individuals providing input (interviewee, etc.). I – Informed: Individuals who must be informed of any changes.						



INTRODUCTION/OVERVIEW

New Mexico Health Care Authority (NM HCA) (hereinafter referred to as “Customer”) has a need to export Salesforce documents to be uploaded into their OnBase system. A custom Web Service will be created that will accept document and metadata payload and upload that as a new OnBase document and Customer is seeking to use the existing OnBase system as their electronic content repository. New Mexico CSSD is currently going live with an existing OnBase solution across multiple locations. This project is an expansion which will build upon the existing CSSD OnBase solution by automatically capturing a new stream of content into OnBase from Salesforce. While this new content is a part of the existing design, it is expected to require additional OnBase configuration – primarily in terms of new taxonomy and workflow expansion.

This is Phase 2 of the original project.

OBJECTIVE

The objective of this document is to present the project scope, deliverables, assumptions, and professional service estimates for implementing the solution at Customer. It will also serve to solicit approval from Customer to move ahead with the described activities upon receipt of a signed copy.

SCOPE OF SERVICES

The scope of this project consists of testing, training and deployment activities associated with the implementation of this project. Installation and/or configuration of OnBase components not listed or that exceed the documented numbers will require an approved change order.

The scope of this initiative will be limited to DataBank performing the following activities:

Activity	Description
Testing	<ul style="list-style-type: none"> ▪ Unit Testing ▪ Create test scripts for User Acceptance Testing (UAT) ▪ User Acceptance Testing (UAT) Support
Training	<ul style="list-style-type: none"> ▪ Create training materials ▪ UAT training for super users ▪ End user training
Production Deployment	<ul style="list-style-type: none"> ▪ Migration of the solution to the Production environment ▪ Go-live support ▪ Create system information document
Project Management	<ul style="list-style-type: none"> ▪ Setup the project in the internal PSA system ▪ Coordinate DataBank technical team personnel and schedules ▪ Manage the project budget and invoicing ▪ DataBank will schedule a project kick-off meeting to introduce project resources and review the project plan with Client ▪ Ongoing planning and coordination ▪ Lead weekly status meetings with the project team ▪ Preparation of weekly status reports ▪ Status reporting to Client Project Manager ▪ Project Plan management



The following items have been discussed but are considered **out of scope** for this project:

Activity	Description
Data Conversion	Work outlined in this SOW does not include data conversion from existing or legacy systems to OnBase. Out-of-scope items would include, but not limited to: data related to integration, content stored in other repositories, etc. If this is desired, an approved change order will be required.
Custom Development	Custom Development is out of scope for Phase 2.
Activities not listed	Activities not listed in the in-scope statement will require a change order.

COMPENSATION AND PAYMENT SCHEDULE

DataBank will charge and bill services fees to Customer for the Professional Services provided under this SOW in the following manner:

1. Milestone or Fixed Bid project payments will be billed upon delivery or completion of the milestone.

All payments for subscription services or services outlined in this SOW must be made via Automated Clearing House (ACH) transfer. ACH transfers are required to facilitate timely and efficient payment processing. ACH transfers should be completed within thirty (30) days from the invoice date, unless otherwise agreed upon in writing by both parties.

PRICING BREAKDOWN

Professional Services Fees – Fixed Bid

The services rendered under this SOW will be delivered on a fixed fee basis. All Fixed Bid or Milestone projects will require a Project Initiation to commence. From that point forward, DataBank shall invoice Customer on completion or delivery of the following project related milestones. Travel and Expenses are outlined separately in the section below.

Milestone	Deliverables	Fixed Bid
Testing	<ul style="list-style-type: none"> ▪ Functional testing ▪ Issue resolution 	\$8,400.00
Training	<ul style="list-style-type: none"> ▪ End user training 	\$6,300.00
Production Deployment	<ul style="list-style-type: none"> ▪ Migration to production ▪ Go-Live Support 	\$7,350.00
Project Management	<ul style="list-style-type: none"> ▪ Project kickoff ▪ Weekly status reports ▪ Support handoff 	\$2,980.00
Project Subtotal		\$25,030.00
Contingency Reserve	<ul style="list-style-type: none"> ▪ Additional Services as deemed necessary 	\$ 15,225.00
Total		\$40,255.00



Note: Fixed cost project. Customer will be billed for the specific milestone amount upon completion of each milestone above. It is important to note that scope can change throughout the lifecycle of a project, requiring the use of DataBank change order process.

Investment Summary

Description	Total
Professional Services	\$25,030.00
Contingency Reserve	\$15,225.00
Estimated Subtotal	\$40,255.00
Estimated Sales Tax	\$3,396.52
Estimated Total	\$43,651.52

Note: Tax Rate Estimate Used: 8.43749999504108%

TRAVEL & EXPENSE POLICY

If travel is required, charges associated with travel and expenses are combined into one fixed price milestone per onsite trip. The milestones are calculated at \$500 per day per resource and include days of travel and days onsite.

Travel requested less than 2 weeks before the planned visit will require a Change Order for additional costs.

NON-STANDARD TIME POLICY

Professional Services are considered non-standard time if they are performed outside of standard business hours in Customer's time zone. In certain circumstances, DataBank will perform work outside of normal business hours. DataBank will only charge a premium when Customer has requested that work be performed outside of standard business hours (see above for location and/or hours details). Premium rates are billed at 1.50 times the quoted services rate.

CHANGE ORDER POLICY

Change orders will be utilized for all scope changes not specifically stated in the in-scope section of this SOW, if the schedule changes from the defined schedule in this SOW, or project assumptions listed in this SOW are not met. This includes billable and non-billable project changes. Purchase orders will be required for all mutually agreed upon billable changes. Any change orders that are agreed upon during the deployment phase can affect the project schedule. The project schedule will be updated and approved by Customer as part of the change order process.

CUSTOMER RESPONSIBILITIES

Customer agrees that the following actions and project requirements will be solely owned and completed/provided by Customer staff and Customer resources. Failure to complete actions will directly impact the project start date, project schedule and project success. Any requirements or Customer responsibilities not provided during the project will result in a change order to account for increased project schedule, increase resource expenses, and increased operating expenses.



Required Prior to Project Start

DataBank resources will be assigned to the project and engaged in project activities beyond the initiation meeting once all of the following requirements have been met by the Customer.

1. Signed Statement of Work and Purchase Order, if required by Customer.
2. All applicable system servers are installed, tested, and properly working.
3. All applicable operating software is installed, tested, and working properly.
4. A network account with rights to the network and hardware is set up and made available to DataBank for both onsite and remote work.
5. Customer will download all applicable OnBase software and place the software in a directory on the server(s) it will be installed on.
6. A work space will be made available for DataBank resources to perform the work described in this SOW. The space will be a physical space if work is performed on-site. The space will be remote machines if the work is performed remotely.
7. Customer will provide project staff with access to all printed and electronic information relevant to this project at the beginning of the project.
8. Customer will assign a project manager or lead resource to manage the day-to-day activities related to the project. This will include ongoing project planning, schedule coordination, and issue escalation in order to meet all milestones/requirements.

Required During Project

Customer will provide the following during the project.

1. Customer will maintain and keep available all line items listed as requirements prior to project start.
2. Customer will manage/schedule its own resources during the project.
3. Customer will test the deployed solution as defined within the SOW.
4. Customer will document all issues/change requests as part of the Customer testing process.

PROJECT ASSUMPTIONS

The following Assumptions are paramount to the defined scope and schedule for this project. Any variables in the project found to not match the listed assumptions will be documented by DataBank project manager as a project risk. A change order will be required for any variables that do not match the project assumptions and that impact the project deliverables, project schedule or project expenses.

1. A purchase order is received by DataBank prior to scheduling development and deployment.
2. A signed Statement of Work is received by DataBank prior to scheduling development and deployment.
3. If applicable, a Pre-Installation form is completed in full prior to deployment.
4. DataBank will deploy the solution as agreed upon in the formal Statement of Work.
5. All DataBank integrations proposed/delivered in this engagement will be architected based on the current version and configuration of the systems that are connected by this integration. Any plan to upgrade or change the configuration of any component of the integrated systems will require a review by DataBank to ensure the integrity of the integration. Customer should contact their DataBank account manager to have this integration reviewed and updated if required. This will ensure the continued success of Customer's solution.
6. DataBank will deploy the solution in Customer's test environment, unless agreed upon by both parties prior to deployment.
7. DataBank will test the system to assure that it performs within the project requirements prior to training.
8. Customer Test system will reflect permissions, system restrictions, user accounts, etc. identical to those implemented in the production environment.
9. DataBank will provide formal testing support as defined in the Statement of Work.
10. During Customer testing, the only issues that will be considered to be addressed are those that impact system performance. All other changes will be evaluated at the completion of testing.



11. DataBank will deploy the system into production once it is functioning per the Statement of Work and any negotiated Change Orders.
12. DataBank will manage/schedule its own resources during the project.
13. Both parties will attend up to 1 project status meeting per week throughout the duration of the project. Attendance will be via remote conference call unless other requirements are agreed upon by both parties prior to acceptance of the Statement of Work. Additional Project Status requirements are subject to applicable Project Management fees.
14. Formal Change Orders will be utilized for all scope changes not specifically stated in the in-scope section of this document. This includes billable and un-billable project changes. Purchase Orders will be required for all mutually agreed upon billable changes.
15. Features not described herein are out-of-scope, and any changes to deliverable functionality may necessitate a change order for additional development hours.
16. Any Change Orders that are agreed upon during the deployment phase can affect the project schedule. The Project Schedule will be updated and approved by Customer as part of the Change Order Process.
17. DataBank assumes no liability or responsibility for any changes made in the production environment that are not made by a DataBank employee.
18. Customer has up to 15 days from the Go-Live date to "Accept" the deployed solution. In the absence of documented exceptions or a signed Work Acceptance document, the solution will be deemed accepted 15-days subsequent to delivery of the Acceptance document.
19. After the solution goes live, DataBank will coordinate a "handoff to Support" call. Any issues identified after this call will be treated as Support Issues and fall under the DataBank Hardware/Software Maintenance agreement terms and conditions.
20. This Agreement may be terminated with or without cause by either Party with not less than ninety (90) days prior written notice. The termination, effective upon the agreed termination date, shall result in the cessation of all work. Termination shall not relieve either Party of any obligation accrued prior to the termination date.
21. Software Manufacturers occasionally publish a schedule that indicates which versions or functionality is no longer supported or being phased into an end-of-life status. DataBank assumes that Customer is taking responsibility for monitoring such end-of-life, deprecation, or sunset schedules and taking necessary precautions. If DataBank encounters a condition in the course of its project work that requires action or modification to resolve such an issue, it may result in a change order.
22. Customer will provide remote access as needed to DataBank developer for configuration, testing, and deployment.
23. Features not described herein are out-of-scope, and any changes to deliverable functionality may necessitate a change order for additional development hours.
24. Customer is responsible for vetting and developing the Salesforce Workflow and/or Salesforce script or processes that will call the Web Service described herein. If the Customer's Salesforce instance has a hard limit on REST web service payload size, then it is assumed that the Salesforce process to call the Web Service will have the ability to divide ("chunk") document data and call the web service multiple times in succession for the same Salesforce attachment. In calling the web service multiple times per document and for multiple documents, the Salesforce process should be capable of managing the OnBase Session ID for proper OnBase Concurrent Client license usage.
25. The Upload function will only support the creation of new OnBase documents. It will not support OnBase document revisions nor renditions.

GENERAL TERMS AND CONDITIONS

The performance of the Services described in this Statement of Work ("SOW") by DataBank for the Customer is subject to and shall be governed by the following terms and conditions. If this SOW is made pursuant to a Master Services Agreement ("MSA"), the terms and conditions set forth in such MSA are incorporated herein by reference and made a part of this SOW.



ACCEPTANCE OF SOW

This SOW represents DataBank’s offer to perform the project on the terms set forth herein; and this offer shall be accepted only upon Customer signing and delivering this SOW to DataBank within 60 days from the date of this document (the “Acceptance Deadline”). DataBank may withdraw this offer at any time prior to acceptance by Customer. In any event, this offer shall be void, and shall for all purposes be deemed to have been withdrawn by DataBank, if this offer is not accepted, in the manner provided above, by Customer on or before the Acceptance Deadline.

For purposes of this SOW, a signed copy delivered by facsimile or electronically shall be treated by the parties as an original of this SOW and shall be given the same force and effect.

IN WITNESS WHEREOF, and intending to be legally bound, the parties have executed this SOW as of the date(s) set forth with their respective signatures below.

DataBank IMX, LLC, a Delaware Limited
Liability Company

Company Name (“DataBank”)

New Mexico Health Care Authority

Company Name (“Customer”)

Kendra Deutsch

By (Signature)

Carlos Moya

By (Signature)

Kendra Deutsch - PS Director

Printed Name and Title
06 / 26 / 2025

Dated

Carlos Moya

Printed Name and Title
06 / 26 / 2025

Dated

Billing Information

Billing Contact and Title

Billing Email Address

Billing Address

Billing City, State, Zip

City, State, Zip



APPENDIX A – WORK ACCEPTANCE FORM

Date Submitted ___ / ___ / ___

Company: _____

Project Name _____

Deliverable/Milestone _____

Exceptions:

- Accept Deliverable
- Decline Deliverable

Comments/Reason:

Company Name ("Client")

Project Sponsor Name (Print)

Project Sponsor Signature

Date

