



## ORDER FORM

### CUSTOMER INFORMATION

Customer: Montgomery County Probation Department      Address: 200 Clark Drive  
 Contact Name: Eric Girard      PO Box 338  
 Email Address: egirard@co.montgomery.ny.us  
 Phone: (518) 853-8380

Catalis Representative: Denton Bosco, [dbosco@catalisgov.com](mailto:dbosco@catalisgov.com), 833-781-8282

### SUBSCRIPTION TERM

Subscription Start Date: April 1, 2024  
 Subscription End Date: March 31, 2027  
 Auto-Renewal: Yes (Annual)

The Initial Term of the Subscription shall begin on the Subscription start date and will continue for 3 years. The subscription shall automatically be renewed for subsequent annual (12-month) terms.

### PRICING

#### 1. Software Subscription Fees

	Year 1	Year 2	Year 3
<b>Annual Fee</b>	\$11,250	\$11,925	\$12,640
<b>Microsoft Azure Government Hosting Services &amp; System Administration</b>			
<b>Total Subscription Fees</b>	<b>\$11,250</b>	<b>\$11,925</b>	<b>\$12,640</b>

- 1.1. Year 1 Software Subscription Fees shall be billed upon the Subscription Start Date.
- 1.2. Future Year Software Subscription Fees shall be billed annually in advance.

#### 2. One-Time Professional Services Fees

<b>Implementation Services</b>	\$0
<b>Total One-time Fees</b>	<b>No Cost</b>

- 2.1. One-time Professional Services Fees shall be billed upon the Execution of this Order Form.

#### 3. Additional Services

Future Professional Services, customizations, modifications, or integrations can be provided at a current year hourly services rate. Any additional work requested will require a Professional Services Work Order.



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**TERMS AND CONDITIONS**

The Agreement incorporates by reference the following, in order of precedence:

*This Order Form*

*The Master Software Subscription and Services Agreement*

<https://catalisgov.com/master-software-subscription-and-services-agreement/>

*The Service Level Agreement and Support Terms*

<https://catalisgov.com/saas-service-level-agreement-and-support-terms/>

*Schedule A: Software Description and Scope of Use*

*Schedule B: One-Time Professional Services Scope of Work*

General Notes:

1. Capitalized terms used herein but not defined in this Order Form have the meanings given to them in the Master Software Subscription and Services Agreement.
2. The Parties agree to keep all aspects of this agreement confidential to the extent permitted by law.
3. Pricing and/or terms are subject to change if the Order Form is not signed within sixty (60) days of the Order Form Date.
4. The Pricing listed above is estimated based on the information available to Catalis at the time of the making of this Order Form. Following adoption of this Order Form, any changes shall be memorialized with a written Amendment, without regard to whether the change affects costs, and shall be approved in writing by Catalis and the Customer. If the Amendment impacts cost to one or more Parties, an estimate of the cost impact shall be included in the written Amendment.
5. Any Recurring Fees will increase annually by the greater of six percent (6%) or the increase in the CPI for the prior calendar year (as reflected in the pricing table(s) above).
6. Invoices shall be due and payable within thirty (30) days following invoice by Catalis.

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**ACCEPTANCE**

**By signing below, signatories represent that they are validly authorized to enter into this Order Form and accept their terms and conditions. The Order Form is dated effective and shall be considered binding upon execution ("Effective Date") by and between both parties.**

**MONTGOMERY COUNTY:****CATALIS COURTS & LAND RECORDS, LLC:**

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_



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## **SCHEDULE A: SOFTWARE DESCRIPTION AND SCOPE OF USE**

This Exhibit provides a description of the Software Services being offered; however, it is understood that detailed Functional Specifications will also be available in separate Documentation provided for guidance on product functionality and usage.

The County's instance of Caseload Explorer and all NYS interfaces will be hosted at Azure Government's primary U.S. Government-only data center in Virginia, with auto-failover capabilities hosted in Texas. System Administration Services, to include:

- Installation of Caseload Explorer and all County Probation data
- Installation and configuration of all required NY State interfaces
- On-demand database scalability
- Remote access to Caseload Explorer outside of the County network without a VPN (assuming County IT approval)
- Disaster Recovery measures, including geo-replication of all databases to different regions, providing data redundancy from any potential datacenter failure
- Apply Windows/SQL Patches (weekly)
- Disk cleanup (bi-weekly)
- Re-boot (bi-weekly)
- 35-day Point-in-Time Recovery
- Set up and Maintain SQL backups with a 7-day retention policy
- Set up and monitor Database Maintenance plans to ensure database health
  - Perform Index ReBuild (Monthly) and Index ReOrganize (Weekly)
- Monitor (CPU, Memory, and SQL Performance); Resolve Issues
  - Real-time performance monitoring
- Install all New Releases, Versions, and Hotfixes (Standard)
  - Including region-specific updates (i.e., Statute Imports for NYS)
- Verify Backups (Monthly)
- Security Audit (Monthly)
- Verify Billing (Monthly)



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## **SCHEDULE B: ONE-TIME PROFESSIONAL SERVICES SCOPE OF WORK**

### **IMPLEMENTATION SPECIFICATIONS:**

#### **Catalis' Responsibility:**

1. Perform the pre-upgrade server requirements checklist.
2. Reinstall the following:
  - o Caseload Explorer application
  - o Deploy Accounting Installation
  - o Set up Work Flow Manager
  - o IPRS Interface
  - o NYPSI Interface
  - o ANA Interface
  - o SORA Interface
  - o RTA Data Extraction Integration Runtime service
  - o Ce Sync Service
  - o Ce Analytics Service
3. Reach out to ITS to obtain IPRS/NYPSI certifications and install them on the new Azure server
4. Provide ITS with the public facing IP address
5. Provision a new service account and password to run the installers
6. Convert documents to Azure blob storage
7. Configure the firewall to allow outbound access to NYS ITS, Ce Sync, and Ce Analytics
8. Continuously maintain, patch and ensure security on the server going forward
9. Performing regular database backups
10. Ensure users are set up to log into Caseload Explorer via Ce Connect accounts

#### **County's Responsibility:**

1. Upload the database bacpac file to Catalis' SFTP or Azure storage container
2. Upload all documents and the document folder structure to Catalis' SFTP or Azure storage container