



Proposal Date: July 8, 2024

Prepared for: Mountain View Whisman School District - Special Education Dept.

Attn.: Frank Selvaggio, Executive Director of Special Education

Phone: (650)526-3500

**EdFiles®- Permanent Records Retention Compliance Solution -
Comprehensive Records Classification, Organization and Management Solution**

Prepared by: Gabriela Turcio

Business Development

Phone: (657)217-3260

Email: info@edrecords.org

EdFiles, Inc.

Business Office

P.O. Box 2434

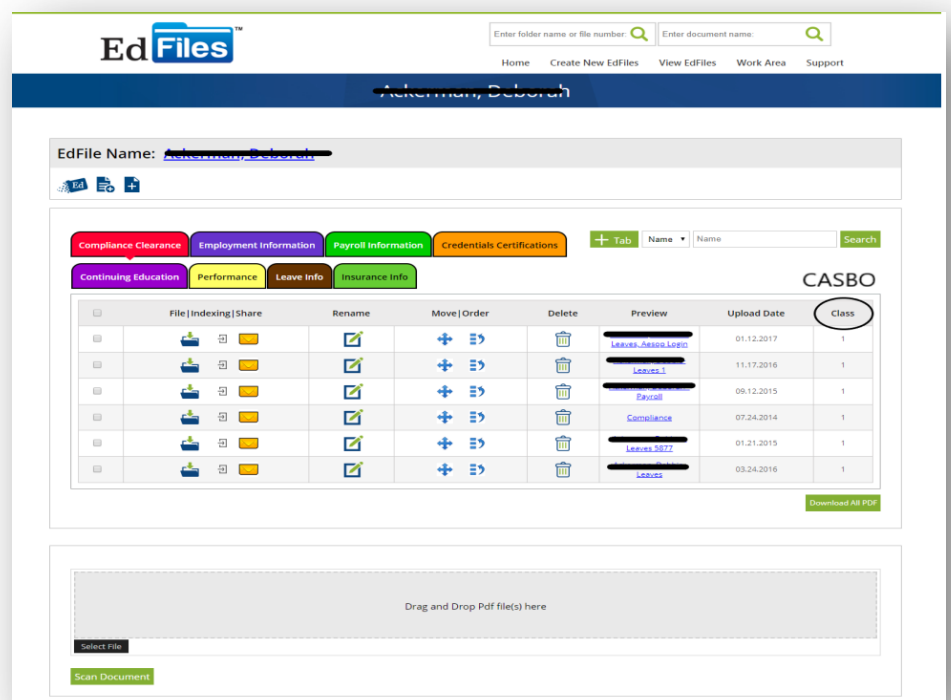
Fullerton, CA 92837

Tel. 1-833-EDFILES or

1-657-217-3260

www.EdFiles.com

www.EdRecords.org





EdFiles® Retention Compliance, Conversion and Management Program Rollout:

EdFiles® has a process in place to ensure successful transition to the use of its EdFiles® Records Compliance Management System for all District Records by Department. Rollout checklist:

- Current Records Classification (Retention Guideline Adherence)
- File Templates Sections Consultations (Already underway)
- Consultation in Paper Conversion/Scanning/Backup Indexing Functions
- Hands on Group & Individual Training Scheduling
- Scanning Service available upon request (optional)



Security is Priority Number One. On all Levels meeting ISO IEC 27002 comprehensive information security management standard.

Our Data Center covers all three critical security areas: physical security; operational security; and system security. Physical security includes locking down and logging all physical access to servers at our data center. Operational security involves creating business processes that follow security best practices to limit access to confidential information and maintain tight security over time. System security involves locking down customer systems from the inside, starting with hardened operating systems and up-to-date patching.

Operational Security

- ISO17799& ISO-IEC 27002 based policies and procedures, regularly reviewed as part of our SAS70 Type II audit process
- All employees trained on documented information security and privacy procedures

- Access to confidential information restricted to authorized personnel only, according to documented processes
- Systems access logged and tracked for auditing purposes
- Secure document-destruction policies for all sensitive information
- Fully documented change-management procedures
- Independently audited disaster recovery and business continuity plans in place and support services

Physical Security

- Data center access limited to Authorized data center technicians
- Biometric scanning for controlled data center access
- Security camera monitoring at all data center locations
- 24x7 onsite staff provides additional protection against unauthorized entry
- Unmarked facilities to help maintain low profile
- Physical security audited by an independent firm



System Security

- System installation using hardened, patched OS
- System patching configured by Rackspace to provide ongoing protection from exploits
- Dedicated firewall and VPN services to help block unauthorized system access
- Data protection with managed backup solutions
- Dedicated intrusion detection devices to provide an additional layer of protection against unauthorized system access
- Distributed Denial of Service (DDoS) mitigation services based on proprietary Rackspace PrevenTier™ system

User Security

You control your files. Documents stored in EdFiles are private by default. They are only accessible to others if you choose to share them or make them public.

- **99.9% uptime guarantee**— We give a 99.9% uptime guarantee to make sure that you always have access to your files. Detailed Security Compliance For:
- HIPAA
- SOX
- GLBA

- FISMA
- SAS-70

Scanning Services Protocols:

- EdFiles has an established quality control plan to ensure that its customers' documents are processed correctly, and that image quality and data entry accuracy meets or exceeds its customer's expectations. The following measures will be put into place to ensure maximum image quality, data accuracy and overall project success.
- EdFiles utilizes Fujitsu, Kodak and other leading document and data capture application for batch-level scanning and image processing. EdFiles provides image cleanup, including de-speckling, de-skewing and other image enhancements if needed.
- Document Prep personnel are trained to properly prepare documents in accordance with the specific project guidelines. Damaged documents are carefully handled and prepared for scanning.
- Documents are scanned and closely monitored at all times during the scanning process. The scanner hardware has ultrasonic double-feed detection technology to avoid undetected double-feeds. Problem images are rescanned.
- Detailed work logs are kept.



Security Plan and HIPAA Compliance:

- EdFiles has been involved in many conversion projects involving sensitive information. We take security very seriously and employ all reasonable measures to ensure that our customer's documents and information are kept secure always.
- All employees go through a background prescreening before hiring and must agree in



writing to a nondisclosure and confidentiality clause as a condition of employment.

EdFiles Comprehensive Retention Compliance Software Solution Pricing Plan:

Description	Qty	Price	Annual
Training and Setup (One time fee)	1	\$699	\$699 (One time fee)
Account with separate users, separate file access for each dept. - meeting security and privacy and EdForms access.			\$5,988 (Annually)
Total (First Year Only)			\$6,687

Annual Renewal: \$5,988

Customer Acceptance to Start Setup of EdFiles Software

We have read and approve the EdFiles' proposal to setup the account, templates and users.

- Software Based Records Management & Compliance Tool

Project Payment Terms:

Software: Annual PO with Monthly Billing for EdFiles Software

Scanning Service: PO for No. of Boxes/File Drawers. Scanning services are billed upon pick up.



Aftab "AJ" Jiwani

Records Retention Compliance Consultant

Direct (714) 749-7990 or Office: 1-657-217-3260



Customer Acceptance to Start Setup

We have read and approve the EdFiles proposal to perform the work described.

- The proposal includes unlimited data storage, unlimited records, unlimited EdForms, etc. IE zero restrictions.
- Ongoing support to help develop EdForms/workflows, train new users, and onboard new departments are all included. IE no additional charges moving forward.
- EdFiles will help develop WA State record retention settings in EdFiles so as files are classified/ tagged they will automatically have the correct retention policies applied.

Prepared for: Mountain View Whisman School District - Special Education Dept.

Attn.: Frank Selvaggio, Executive Director of Special Education

Phone: (650)526-3500

Approved by (print name): _____

Title: _____

Signature: _____

Date: _____