



Ability Indiana Technical Assistance Webinar
December 4, 2018

Welcome!



Agenda for the Webinar:

- Salesforce
 - Review of definitions of the data input
 - Step by step process of a sample report
 - How Ability Indiana uses the data collected through our system
- Contract Process
 - Best Practices for Contract Renewals
 - Renewal Process without a price increase
 - Renewal Process with a price increase
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General Definitions:

- **Job Stations**
 - A job station is a specific task performed by an individual or individuals as part of the contract completion.
- **Competitive Employment**
 - Competitive Employment means any Ability Indiana Program work performed at or exceeding minimum wage.
- **Competitive Integrated Employment**
 - Competitive Integrated Employment refers to individuals with disabilities being hired by an outside company, at or above minimum wage, and interact with individuals who do not have disabilities.

Salesforce



General Definitions:

- **Consumable Supplies**

- The items used in the contract to provide the service.
 - i.e. toilet paper, paper towels, etc.

- **Overtime**

- All wages that were paid to any employee who worked more than 40 hours a week.



Terms for Monthly Reporting:

- **Job Stations Created**
 - Provide the number of new job stations created during this new time period.
- **Job Stations Sustained**
 - Provide how many job stations were sustained by this Ability Indiana Activity since the last reporting period.
- **People with Disability On Activity**
 - Provide how many people with disabilities were working on this Ability Indiana Activity. Please include anyone that filled in for vacation, sick time, etc. This is a count of all workers regardless of the number of hours worked on the contract.



Terms for Monthly Reporting:

- **Total Income Earned**
 - Provide the total amount of income earned (payroll) by all people with disabilities working on the Ability Indiana Program Activity.
 - i.e. Gross wages prior to any deductions.
- **Total Hours Worked**
 - Provide the total hours worked for all individuals who worked on this activity.
- **Average Hourly Wage Paid**
 - Provide the average hourly wage paid to an individual with disabilities, working on this Ability Indiana Program Activity. Average wages is computed by dividing the total payroll by the total hours worked. **Note: Ability Indiana will compute this information.*



Terms for Monthly Reporting:

- **Worked in Competitive Employment**
 - Provide how many people with disabilities worked in Competitive Employment as a result of this Ability Indiana Program activity.
- **Entered into Competitive Integrated Employment**
 - How many people entered into Competitive Integrated Employment since the last reporting period.
- **People with Disabilities Actively Engaged**
 - Provide how many people with disabilities working on Ability Indiana Program Contracts were actively engaged in Vocational Rehabilitation Services. At a minimum an individual is assigned to a VR Counselor.



Terms for Monthly Reporting:

- **Benefits offered** - *Check these boxes if this benefit is offered to any individual with disabilities working on Ability Indiana Program Activities.*
 - Holiday Paid
 - Life Insurance
 - Medical Insurance
 - Other
 - Sick
 - Retirement
 - Vacation



Terms for Monthly Reporting:

- **Monthly Sales**
 - Please report your monthly sales.
 - i.e. what your organization invoiced the customer by the end of the month.
- **Consumable Supplies**
 - Please report your monthly consumable supplies.
 - i.e. what your organization invoiced the customer by the end of the month.
- **Monthly Sales Other**
 - Leave this field empty, unless otherwise directed by Ability Indiana.
- **Monthly Sales Overtime**
 - Please report your total overtime payroll for the month.

Salesforce



How Ability Indiana uses the data collected:

- All of the data that is collected in Salesforce is turned into different reports.
- These reports are communicated to the Ability Indiana Board of Directors and the Ability Indiana Committee.
- In advocacy efforts for individuals with I/DD and all Certified Ability Indiana Organizations



Questions?



Sample Scenario from the Beginning:

- From main screen, click on Accounts Tab. Choose “All Accounts” in the drop down, click on “GO” and your organization will appear. Click on your organization name.

A screenshot of the Salesforce user interface. The browser address bar shows a secure connection to a Salesforce community page. The page header includes the Ability Indiana logo, a search bar, and a user profile for Mindy Duddy. The main navigation bar has tabs for Accounts, Orders, and Activity Reports. Below this, there is a 'Create New...' button and a dropdown menu currently set to 'All Accounts', which is highlighted with a large orange arrow. To the right of the dropdown are 'List', 'Feed', and a printer icon. On the left side, there is a 'Recent Items' sidebar listing several accounts. The main content area displays a table with columns for Action, Accounts Name, Billing State/Province, Owner First Name, Owner Last Name, and Accounts Number. The table contains one row for an account named 'Rauch' in the state of 'IN', owned by 'Barb Young'.

Action	Accounts Name	Billing State/Province	Owner First Name	Owner Last Name	Accounts Number
	Rauch	IN	Barb	Young	

Salesforce



Sample Scenario from the Beginning:

- Within the CONTRACTS section, click on the contract number for which you will be entering Activity Report data.

The screenshot shows the Salesforce interface for an account. The "Account Detail" section includes "Accounts Name" (Rauch [view Hierarchy]), "Accounts Owner" (Barb Young), and "Address Information" (845 Park Place, New Albany, IN 47150). Below this is the "Contacts" section, which is currently redacted with a large orange block. The "Contracts" section is visible and contains a table with the following data:

Action	Contract Number	Status	Contract End Date	Effective Date	Product/Service	Contract Record Type
Edit	00000175	Active		1/17/2015	BMV - New Albany	Service Contracts
Edit	00000176	Active		1/24/2016	BMV - Jeffersonville	Service Contracts
Edit	00000222	Active		7/1/2014	Toxicology Kits	OPA Product Contracts

A red arrow points to the contract number 00000222. Below the contracts section is the "Orders" section, which is also redacted with a large orange block.

Salesforce



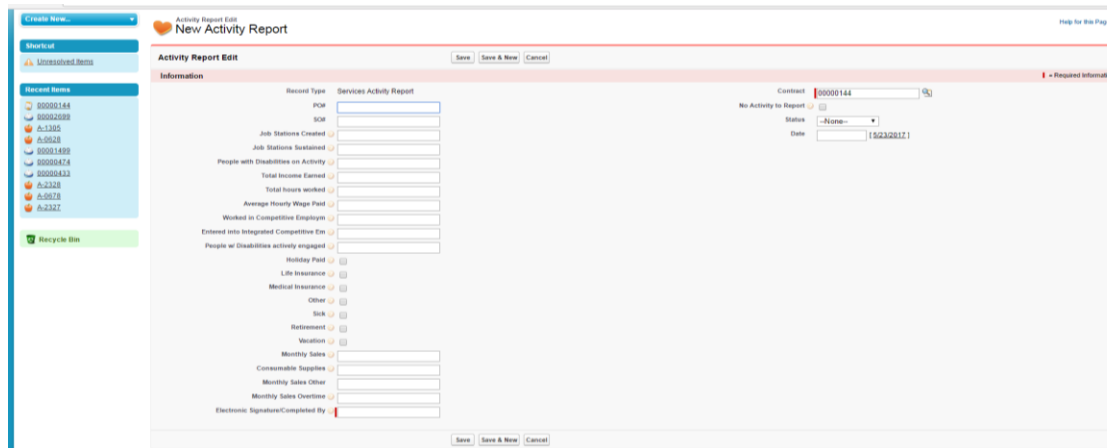
Sample Scenario from the Beginning:

- On the contract page, scroll to the bottom to the ACTIVITY REPORTS section. Click on “New Activity Report.”

A screenshot of a Salesforce contract page. The browser address bar shows the URL: https://abilityin.force.com/community/800360000007qQq. The page displays contract details for "BMV New Albany" under the "Rauch" account. The contract number is 00000175, and the status is "Active". The effective date is 1/17/2015, and the expiration date is 1/16/2018. The system information shows it was created by "The SMBHelpDesk" on 2/3/2017 at 10:46 AM and last modified by "Asher Weaver" on 5/25/2017 at 9:52 AM. Below the system information, there are sections for "Contact Roles", "Activity History", "Notes & Attachments", and "Activity Reports". The "Activity Reports" section is highlighted with a red arrow pointing to the "New Activity Report" button. The "Activity Reports" section also shows a table with columns for "Action" and "Activity Report Name", with entries for A-6537, A-6270, A-6272, and A-6292.

Sample Scenario from the Beginning:

- Select Services Activity Report or Product Activity Report, and click Continue.
- Fill out the following page with the information that would normally be provided on the physical copy of the Activity Report. **Note: “Total Hours Worked” is a new requirement. This line refers to total hours worked by employees on Ability Indiana related contracts for the month. DO NOT fill out the section marked “Average Hourly Wage Paid,” as this will be automatically calculated after submission. DO NOT use the “Monthly Sales Other” section.*



The screenshot shows the 'New Activity Report' form in Salesforce. The form is titled 'Activity Report Edit' and 'New Activity Report'. It includes a sidebar with 'Recent News' and a main form area with various input fields. The 'Information' section includes fields for 'Record Type' (Services Activity Report), 'Contract' (00000144), 'Status' (None), and 'Date' (15/23/2017). The form also includes sections for 'People with Disabilities on Activity', 'Total Income Earned', 'Total hours worked', 'Average Hourly Wage Paid', 'Worked in Competitive Employment', 'Entered into Integrated Competitive Em', 'People w Disabilities actively engaged', 'Holiday Pay', 'Life Insurance', 'Medical Insurance', 'Other', 'Sick', 'Retirement', 'Vacation', 'Monthly Sales', 'Consumable Supplies', 'Monthly Sales Other', 'Monthly Sales Overtime', and 'Electronic Signature/Completed By'.



Let's Try a Custom Scenario:

- Company X has a state contract for Widgets.
- This month they sold 30,000 Widgets. These Widgets have 10 very unique steps but this month the state requested special finishing so Company X had to add two additional steps.
- They normally have 20 employees work but because of sick time and vacation they had 30 employees work on the contract.
- They paid their employees \$3,000 for 300 hours of total labor. They however billed the state \$30,000 for the project.
- All of the employees had a job coach through VR and because of their training 3 of them were able to land a job at a local automotive plant which means 30 of them worked in Competitive Employment and three worked in Competitive Integrated Employment.



Questions?

Contract Renewal Process



Basics:

- Typically, state contracts are awarded for a two (2) year term, with a written condition for two (2), one year renewals by mutual agreement between the Indiana Department of Administration (IDOA) and the Certified Ability Indiana Organization (CAIO).
- Terms can be changed in any renewal with mutual agreement.

Contract Renewal Process



Communications and Renewal Timing:

- Approximately 45-60 days before the specified expiration date of the contract, the CAIO holding the contract will be contacted by the assigned IDOA contract manager and Ability Indiana staff.

Contract Renewal Process



Ability Indiana staff will assist and coordinate with every step in the process:

- Organization management will be asked if the CAIO wants to renew the existing contract.
- During the renewal period, Ability Indiana staff will review with the CAIO any requested changes to contract language/descriptions, terms, conditions, and/or pricing.
- This includes any changes, additions or deletions, to the contract products and/or services.

Contract Renewal Process



Changes to Renewal Contracts:

- It is very important that all requested changes to the contract being renewed be well defined and justified in writing.
- Ability Indiana will communicate these to the appropriate IDOA contract manager for reviews and approvals for contract amendments organizations.
- **Note: The more changes made to a contract, the slower the process.*

Contract Renewal Process



Price Increases (when warranted):

- Price increases are sometimes necessary to cover increases in material costs, packaging costs, and shipping costs.
- However, all price increase requests must be justified in writing to the satisfaction of IDOA.

Contract Renewal Process



Components of an ideal justification and support of a reasonable price increase are as follows:

- Identify the month and year of the last price change, increase or decrease, in the existing contract.
- Provide copies of supplier/vendor letters notifying the organization of price increases to the organization.
 - Supplier/vendor letters should be specific as to the amount and/or percent of increase and the raw materials/product materials affected by the increase.
- For increasing shipping charges, include copies of letters from common carriers, UPS, and/or FedEx, since state contracts include pre-paid shipping charges.
- Include copies of industry recognized price and cost trends data, which are available in trade publications, subscriptions, industry-wide commercial price tracking and/or commodity reports.
 - The Dept. of Labor publishes Producer a Price Indexes (PPI). Ability Indiana staff can assist and provide recommendations.

Contract Renewal Process



Fair Market Pricing (FMP):

- For Ability Indiana Program contracts, products and/or services must be priced to fair market pricing as required by Indiana code, Ability Indiana Committee policies, and IDOA policies.
- Fair market pricing is defined as the products/services must be within 10% of competitive price quotes from other commercial sources; generally at least three (3) other sources.
- Ability Indiana staff can assist the organization with developing FMP analysis reports.



Questions?



Thank you!