Request for Information

RFI # 32236

Case Management, Information and Payrolling System (CMIPS)
Electronic Visit Verification (EVV)

Response Provided by:

NORTHSTAR-IS
Information Solutions

12/6/2017
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Executive Summary

Northstar-IS was created in 2016 but the principles have a combined 25 years in electronic document management. Our role is to provide innovative electronic information management to both public and private sector clients. That entails understanding and documenting the customer’s current business process and then suggesting and implementing technology solutions that enhance those processes. Our tools include database management, document management, workflow and electronic forms development. By utilizing best of breed tools, we can have a dramatic effect on the customers information processing efficiency and accountability. All our applications are database driven and thus automatically provide a comprehensive audit trail to any business process. This leads to powerful data analytics which provide information to document results and better plan for future resource consumption.

Unlocking the potential of technology solutions requires collaboration and continued communication with our clients. Our solutions are never out of the box as each customer’s requirements and environment is unique, but our solutions meet a non-proprietary litmus test to ensure maximum flexibility and sustainability of the applications we create.

We have several years in development of applications in support of the IHSS system. Our focus has been on Case Management at the county level with client intake and the client assessment process. Using the very powerful Formatta Forms application tools, we created a comprehensive solution for paperless case initiation, assignment and in-home assessment of IHSS clients. This solution utilizes CMIPS data (Daily Download) for case identification and initiation of the assessment process. We have provided workflows that allows for load balancing case assignments, re-assignments, and intra-agency referrals (PHN, APS, CPS etc.). This paperless case management process has been in production for two years and has reduced the time to establish an IHSS case by 50%.

We believe this knowledge and experience properly position Northstar-IS as a valuable partner in the advancement of an EVV solution for CMIPS.

About Northstar-IS

Founded in 2016 by professionals from the Information Technology and HealthCare industries, Northstar-IS focus is on bringing our broad experience in project development and project implementation to public sector clients. The clients are our best salespeople as they testify to our values and competence. We understand that building good business relationships with team members is key to the success of any project. We work collaboratively with our clients to create systems that provide the best outcomes in terms of form, function, and reliability.

About Access

As partners with Northstar-IS, Access has empowered Northstar-IS with powerful eform solutions and workflow to help meet their clients’ needs. By partnering with Access, Northstar-IS is able to leverage decades of experience and a vast client base ranging from city, county, state and federal government clients as well as small, medium and large private clients such as Expedia.
For more than a dozen years, Access has been delivering solutions that solve the real-world pain points of hundreds of organizations worldwide. They are the leading provider of e-forms management software products and solutions, which enable organizations in any industry to effortlessly capture, manage and exchange data between e-forms and business systems.

Access is committed to enabling change through innovative technology — creating paperless and paper-light processes with green technology, improving work environments by making people’s jobs easier and allowing organizations to communicate more effectively with their employees, customers and vendors. They back up their solutions with proven professional services and support practices that give the customer the expertise and responsive assistance needed to make their implementation a success.

Integrity is important to Access, and that’s why they back up their commitment to change through their corporate practices, such as giving back to the community by supporting non-profit organizations and reducing their environmental impact with a virtual work environment and paper-light marketing and sales strategies.

References

Northstar-IS clients are our best sales people. Feel free to reach out to the references below to hear about our service and solutions:

Sharon Gibson  
Solano County  
In-Home Supportive Services  
Phone (707) 784-8234  
Email: SGibson@SolanoCounty.com

Rhonda Anderson  
State Records Coordinator  
California Department of Developmental Services  
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Email: Rhonda.Anderson@DDS.CA.gov
Northstar-IS Solutions

The experience of Northstar-IS (NIS) has been from the ground up when it comes to Personal Care Services. Since 2015, NIS has been supporting the County of Solano after implementing an eforms based case assignment, and home visit assessment process. This successful solution has provided the County with a variety of benefits:

**Electronic Visit Verification** – By using electronic forms, the social workers document their visit electronically (including a date and timestamp), verified by a digital signature of the recipient on their tablet device. The social workers then digitally authenticate and submit the forms using their Windows credentials.

**Intelligent Case Assignment and Workflow** – As new recipients apply for IHSS, the workflow process uses intelligent form routing to assign cases to social workers based on individual characteristics of the recipient such as language, location, and age. The system also provides supervisors with a case assignment summary, allowing them to manage caseloads for social workers and re-assign cases as needed.

**Paperless environment** – By electronically routing and storing applications, case related documents and referral forms, Solano County was able to eliminate their paper case file storage creating additional office space and allowing social workers to work remotely possible.

**Smart forms** – Using eforms to complete assessments has transformed the way Solano County social workers perform home visits. By auto populating case information from CMIPS into eforms, the social workers no longer need to re-write or type information on forms. When complete, the digitally signed forms are automatically filed into the County’s electronic document management system, allowing them to be accessed by the social workers day and night, in the office, or in the field.

**Security** – By electronically classifying and storing the eforms automatically in a secure repository, access to documents can be controlled using existing Windows Active Directory groups.

**Data Analytics** – Since every field in every form is captured and stored in a database, Solano County can now provide reporting on case statistics unlike ever before. Statistics about the County’s case population such as age, location, diagnoses, living situations, medications, medical equipment and much more are now being used to improve care and assign appropriate resources throughout the County.

To view a video demonstration of this solution, [Click Here](https://drive.google.com/open?id=0B3zwGgDxvRF2zNlVOb0ZmVGdBeDg) or visit: https://drive.google.com/open?id=0B3zwGgDxvRF2zNlVOb0ZmVGdBeDg
Overview of Proposed Solution

As a solution to the upcoming EVV requirement, Northstar-IS would propose an electronic form based solution for statewide implementation. Using tried and true software from Northstar-IS partners, Access Formatta, a customized eform would accomplish the requirements the state is seeking. Benefits of using and eform as the basis for the EVV include:

- Provider and Recipient verification
- Automated capture of EVV data elements
- Customized UI
- Ability to pass data to/from Line of Business Systems (CMIPS, ETS, etc.)
- Secured 128-bit encryption
- Digital signature capability
- Workflow routing and approval processes
- Auto-date/time capture and calculation

Using an eform as the basis of the EVV, in either the Individual or Agency Provider model, the provider would select their task from a drop-down menu and start/stop their time using buttons on the eform whenever they start or stop providing services. The eform could be securely accessed from a hosted or on-premise site, with multiple languages available. The form could also be downloaded locally to a Computer/Tablet/Mobile device to support cases in which providers are in areas with little or no internet connectivity. The eform would also support corrections to calculated times and tasks, prior to finalizing the services. In the Individual Provider model, information regarding the services would be summarized and sent electronically to the recipient for approval. Each value on the EVV form can be exported and passed as data to a database or any other system that accepts data. After approval, the data from the EVV would be used to automatically populate a timesheet that could be signed off by both parties before being submitted for payment. As an eform, the timesheet would support both “wet” and authenticated digital signatures. In the Agency Provider Model, this same summary could be sent to the Agency, County, and CMIPS with multiple varying customizable rules for approval, review and workflow steps before being passed to CMIPS. Integration with CMIPS data would ensure that time for tasks are reasonable and within tolerance.
Attachment A – RFI General Questions

1. Describe how your company delivers this type of electronic verification solution or service in similar Medicare and Medicaid settings, or other similar health care settings for consumer directed personal care and/or home care service delivery. Include a description of the population characteristics of individuals currently served by your system(s) and include the number of members.

Northstar-IS has deployed a very similar solution for the County of Solano (See Northstar-IS Solutions Section). The electronic form based solution documents and tracks the visit of County social workers to the home of IHSS recipients. During this process, the County social workers can use eforms to:

- Auto-populate data from CMIPS
- Generate referrals
- Document cases of fraud and other observations
- Pass data to be imported into CMIPS
- Capture an electronic signature of the recipient
- Digitally authenticate the social worker and sign their forms
- Trigger additional workflows including emails and follow ups
- Auto-file every filled form into the County’s Document Management System

The population is nearly identical to the recipient population for the scope of this project. Disabled individuals requiring home care by providers that are typically family. These recipients speak and understand many different languages and are in varying urban/suburban/rural neighborhoods with and without internet connectivity. Solano County has a recipient population on the scale of roughly 5,000 but the solution is scalable to accommodate a population 100x the size.

2. Provide a detailed description of the EVV System:
   a. Functionality of the system including the devices, methods of data collection, technology and infrastructure requirements for both individuals receiving services (Recipients) and service providers (Providers), (e.g., land-line telephones, cell phones, in-home fixed device, tablet, internet, GPS).

   The EVV system would be an electronic form based solution that could be used via PC/MAC, tablet or Apple/Android mobile device. The eforms could be downloaded via a public site, and saved to the providers’ devices for use with no internet connectivity. Upon beginning a task, the provider would be able to select their task and start the clock for the duration of performing the task. The provider would also have the capability to edit start/stop times. The data elements on the electronic form would be captured in a back-end database upon submission of the EVV. The data elements from the EVV electronic form could also be, validated, approved, and pro-populated into a timecard or timecard system.

   b. Describe how your EVV solution could meet challenges inherent to California. Include challenges specific to the large volume of Recipients and Providers and how to address
the fact that approximately half of IHSS and WPCS Providers are family members and/or live in the household with the Recipient.

The EVV solution would be simple enough that it could be used with very little instruction or guidance needed. By working with any PC/MAC device, anyone with access to an electronic device such as a cell phone, tablet or computer with internet connectivity would be able to access the EVV. Regardless of their relationship to the recipients, providers with some method of internet access would have access to the EVV.

c. **Security features of the system that confirms the identity of both the Providers and Recipients and how that data is kept secure.**

Data transmitted via the EVV would be done via 128-bit encryption. Each provider would have their own completely unique username and password which they would use to securely sign and submit their EVV.

d. **Data collection, including information identified in this RFI Section 5 Proposed Environment.**

By utilizing an electronic form based solution, every element entered on the eform entered by the provider and approved by the recipient is captured as data and written to a database(s). Dates, times, and approvals by the provider and recipient can all be captured and transmitted securely.

e. **Features that address the requirement that allows Providers to modify or “fix” information (i.e., if they forget to check in/out).**

Prior to authentication and submission for approval by the recipient, the provider has the ability to “fix” information if they forget to clock out or make any other mistake on the EVV eform.

f. **Features that conform to the concept of being minimally burdensome.**

By working with any PC/MAC device and being simple to read, the EVV solution would be minimally burdensome to anyone with access to the internet with a PC/MAC device. Enhanced zoom features for visually impaired individuals would be included as well as helpful links to instructions and FAQs built into the EVV eform.

g. **Features of the system that conform to the Americans with Disabilities Act (ADA) and address needs of special populations of Providers and Recipients, such as developmental disabilities and visual/hearing disabled.**

The EVV would be even easier to use than the forms needed to apply for provider status. As mentioned above, the EVV would have enhanced zoom and helpful links built in for users with developmental and visual disabilities.
h. **Features of the system that address the needs of special populations that cannot be near electronic devices.**

Individuals who cannot be near electronic devices, by definition, would not be able to be near any Electronic Visit Verification system and would need to use the existing methods for review and approval of services provided.

i. **Features of the system that address the provision of EVV in rural areas where technology infrastructure may be limited or unavailable.**

The EVV as an electronic form, could be used and filled out with no internet connectivity. However, the download and submission of any EVV data would require internet connectivity.

j. **Additional features the system offers outside of EVV.**

Additional data about the duration, frequency and timing of access could be collected and reported on, in addition to all data elements referenced in section 5 of the RFI.

k. **Service level metrics including system availability and system capacity.**

System availability and capacity would depend on the location of the environment, whether it be supported at the State or County level and either in an on premise or cloud based solution.

l. **Contingency plans for system outages or unavailability.**

In the event of an outage, providers would still be able to track their activities and times. Service would need to be reinstated prior to submission of any data.

m. **Flexibility of the system to implement changes and how quickly changes can be made.**

Describe how the system has built in flexibility such as the ability to meet business needs or make changes through simple configuration set up and/or configuration changes.

As an electronic form based solution, changes to the EVV can be made quickly, easily and applied globally. The solution can be versioned, ensuring that changes are pushed out to all users, with the ability to restrict old versions from being used.

n. **Types of analytics and reporting provided.**

Any element on the EVV can be reported on as well as dates, times, durations and timing of access and submission of EVVs.

o. **Typical account set up time and check in/out time for Providers and Recipients.**

Typical account time and setup for providers and recipients would be on the magnitude of minutes.

3. **Describe if/how the system groups or categorizes tasks to simplify system operation,**
tracking, Provider and Recipient use, etc.

As an eform, the EVV could be completely customized in terms of groups of categories and tasks. The state would have full discretion on how the tasks would be grouped/categorized. An initial pilot interface would be developed and tested, with the ability for quick, easy, global changes to be made.

4. Describe the system’s capability to interface with other systems, for eligibility, timekeeping, payroll or data collection purposes.

The EVV as an eform has the ability to interface with ANY system that has the capability of accepting data. Each element captured in the EVV could easily be exported as data.

5. Describe your experience with implementing EVV systems including high-level timelines for implementation and training for all user populations. Describe implementation challenges and lessons-learned. Describe how to overcome implementation challenges. Distinguish implementation(s) for government entities versus private entities. If implemented for state entities, please identify which states and provide contact information.

Experience in implementing systems like the EVV being requested are described in the Northstar-IS Solutions section in the beginning of the RFI. While this is a County based solution, Northstar-IS has worked on projects at the state level in California. A high-level timeline estimate for completing a project of this magnitude would be less than 12 months for initial deployment. Additional follow up training, improvements and revisions would be as necessary and required. Northstar-IS has worked with Private and Public organizations from small businesses to as large as State departments within California. When working with any organization, planning and being flexible are what have made Northstar-IS successful. A lesson learned in years of doing business with public and private organizations is “plan the work, and work the plan”. Meaning do as much preparation as possible but always be prepared to adapt along the way.

6. Describe how to overcome implementation challenges inherent to California such as the change management for a large and vulnerable population. Describe mitigation strategies that could be used to address challenges.

Northstar-IS is no stranger to working with the state as well as County and City level organizations. Being a nimble and flexible organization has always provided an advantage when dealing with California and large organization change management processes. Constant communication and a collaborative approach have helped ensure large projects become a success for Northstar-IS and the state of California.

7. Discuss strategies you have employed to garner customer satisfaction and include any satisfaction survey data, if available.

When working with a large end user group, working from the ground up has been invaluable to the success of many of the Northstar-IS projects. Clear and concise training documentation in several formats and languages can greatly improve the success of training a large and diverse end user population such as the audience for this project.
8. Describe the response to your EVV from a wide range of Recipients and Providers with a wide range of disabilities including blind and deaf and/or low literacy levels.

As a simple eform, the EVV solution could be used by recipients and providers with low literacy levels as well as the visually impaired and deaf.

9. Discuss ongoing maintenance of EVV systems.

Ongoing maintenance of the EVV system would require little effort, outside of maintaining infrastructure. Changes to the EVV could be made simply and quickly as a collaborative effort with IT or contractor.

10. Describe if/how the EVV solution can leverage the current IHSS Portal with the ETS feature and the pros and cons of doing so.

The EVV solution could certainly leverage the IHSS portal and ETS feature by passing data to the ETS from each EVV eform submission. The data from each EVV submission would be validated against rules applying to the specific recipient, approved by the recipient and then submitted to the ETS automatically via a data transfer.

11. Describe how an EVV solution can be effectively implemented for both the Individual Provider and Agency Provider employment models.

The EVV solution can be deployed using either the individual or agency provider model. With the Individual Provider model, the timesheets would be generated using the data captured from the EVV. Times for the services provided would be entered by the provider and a timesheet would be automatically generated and sent to the provider for review and approval. After reviewing and approving the timesheet, it would then be sent to the recipient for electronic signature and submission to the ETS for processing. With the Agency Provider model the provider would use the same EVV solution and the data would go through an approval process via the agency and County. Upon approval, the data would be transmitted directly to CMIPS for processing and payment.

12. Describe your business model (e.g., Software as a Service, Commercial Off-the-Shelf, Modified Off-the-Shelf, custom built, transactional).

Northstar-IS solutions are a combination of software as a services (SaaS), modified off-the-shelf, and custom built. SaaS solutions include cloud based invoice processing and data storage. Modified off-the-shelf solutions are provided by Access Formatta for eforms and Workflow as well as OpenText for Capture, recognition, classification, extraction, workflow and storage.

13. Describe the costs and fee structure of EVV solution(s) for customers with requirements comparable to the IHSS, WPCS, and other HCBS Waiver programs. Differentiate between Individual Provider and Agency Provider employment models. Identify both one-time and ongoing costs. Describe how the cost model would scale up to accommodate the large number of IHSS and WPCS Providers.
A proposed EVV solution would be priced as a combination of software and maintenance (or SaaS), submission based licensing (per EVV), and professional services for development, implementation and training. Both the Individual and Agency Provider models would be priced using a similar structure. One time costs would include professional services and on-premise software and licensing (if desired as opposed to SaaS). Ongoing services would be software maintenance or SaaS. A proposed solution would be completely scalable to accommodate a statewide implementation.

14. Describe how the EVV solution for personal care service that must be implemented in 2019 could be expanded to accommodate the 21st Century Cures Act home health care service EVV requirement by January 1, 2023.

As described earlier, the EVV system could be implemented in less than 12 months and could be expanded and scaled to accommodate the 21st Century Cures Act home health care service EVV requirement by January 1, 2023. The proposed solution uses completely scalable and flexible eforms, workflow and storage solutions that can easily accommodate the State’s needs.

15. Describe the different means of communication (e.g., notifications) the system is capable of producing such as letters, e-mail, text, and phone in multiple language formats for visually and hearing disabled including large font, braille, and audio text.

The EVV system is capable of communicating via letters, e-mail, and text in multiple languages and could be deployed using mobile devices.

16. Describe how your system is kept current and how it keeps up with technology changes.

Formatta has been used as an eforms system since the mid 1990’s and has kept current with changes in technology over time. Electronic signatures, 128 bit encryption and built in integrations with major systems have kept Formatta relevant over time.
Case Study: In-Home Supportive Services eForms Application
County of Solano

Description of the problem
The In-Home Supportive Services (IHSS) Program was created to help qualified individuals receive program sponsored services in support of population health and to allow these individuals to age in place as an alternative to nursing homes or board and care facilities. The IHSS Department of Solano County needed a way to eliminate the accumulation and subsequent storage of paper, accommodate traveling (hoteling) case workers, create a more efficient case assignment and management process, and eliminate redundant tasks and inefficient processes.

The Solution
Northstar-IS transformed over 50 paper forms into eForms with built in workflows that are auto-filed into the county’s Document Management System. Northstar-IS also implemented a new case assignment workflow process to increase efficiency and eliminate redundancy.

Working with Northstar-IS
“The Northstar-IS team members consistently exhibited the highest level of professionalism. Their collective brilliance, knowledge, capability, patience, and humility has been the perfect combination of qualities needed to take on the monumental task of transforming 40 year-old work practices using cutting edge technology. Their high level of knowledge and ability never hindered their ability to listen to our needs as the customer to ensure delivery of a product that works well for us. When we explained the current state, they were able to clearly outline solutions we didn’t know were possible, and deliver the promised results.”

The Outcome
“The Northstar-IS team spent a tremendous amount of time working with our staff to achieve a level of comfort so they could do their jobs the new, more efficient way and actually begin to love the changes. They took a lot of the fear out of the changes by patiently training all of the staff. They listened to everyone and made every effort when possible to meet the needs of the individuals doing the work. We have successfully transitioned to work processes that have improved the function of each classification and has allowed for greater mobility as the department moves toward hoteling and mobile work.”

-Sharon Gibson
In-Home Supportive Services, Solano County

Quick Facts:
• 50+ paper Forms replaced with eForms
• 2,000+ Data fields captured for statistical analysis
• 5,000+ documents auto-filed into the Document Management System every month

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Meeting eGovernment Mandates while Reducing Costs, Processing Time and Paper Storage

At state and local levels, eGovernment is not only a goal, it’s a legislated requirement. With increasing citizen demand for enhanced services, and cost containment, state and local agencies need solutions that will optimize and streamline their current processes. Many state and local government organizations use Formatta software to replace manual data processing or to place their forms online to significantly reduce operating costs and inefficiencies, while increasing service and productivity.

A major part of all state and local initiatives include eliminating paper while still providing accessibility of government forms and documents to those that do not have, or cannot use, electronic content and services. As a result, these initiatives create a greater demand for automating paper processes. Formatta enables organizations to quickly and easily convert paper forms into online information.

In today’s increasingly connected business environment, the delivery of almost every product or service involves collaboration between applications and information. By capturing, processing and connecting information from forms and documents more effectively and efficiently, state and local agencies can extend business processes across their entire value chain and accelerate ROI on technology investments.

More than just an electronic version of a paper form, Formatta quickly captures, verifies, approves and integrates data with the business critical systems used to run your organization.
The Formatta Solution
Formatta enables organizations to stay competitive by increasing the efficiency and productivity of every employee in the organization. The Formatta solution includes:

Design e-Forms easily
• Create and publish Formatta e-forms without programming
• Import PDFs and other forms for rapid design
• Add validations, formulas and automation
• Protect forms with built-in encryption tools
• Lock forms and fields for data security

Capture data using a free browser for online use or a downloaded client for offline use and saving files
• Enter, save and submit information
• Auto-populate fields based on prior data entered
• Guide users completing forms with field-specific help
• Validate field-level data and form-level completeness
• Provide offline capability for e-Form completion
• Comply with Section 508 requirements

Manage data and e-Forms
• Administer publishing and processing of forms
• Establish multi-level security access for form managers
• Control form access and processing by user or user group
• Modify existing forms or process logic
• Manage and track form versions
• Configure custom integration between forms and back-end systems

Integrate data with business applications
• Move data to and from business systems quickly and easily with secure two-way integration
• Utilize industry standards such as XML, SMTP, HTTP, ODBC, and SOA to connect to your existing infrastructure
• Capture, route, and archive submitted forms as documents and records
• Implement real-time data collection and integration with simple SQL

More than just an electronic version of a paper form, the Formatta solution quickly captures, verifies, approves and integrates data used in enterprise processes with the critical enterprise systems used to run organizations. While other solutions solve document/record management and business process management problems, they do not efficiently capture data from paper and paper equivalents and easily integrate it to business applications that require it. Formatta provides the most affordable, scalable, and easiest to implement, use, and maintain e-forms data capture and integration solution.
Formatta Product Suite: Unparalleled Security in Data Exchange

Benefits
Formatta is the only e-forms company to include built-in, 128-bit encryption in all of our products. Encryption is an important aspect of security and privacy, especially when using forms on the web.

As a result, Formatta products provide unparalleled levels of security to both the e-form author and users across the Internet.

For more information visit www.formatta.com.

Using E-forms on the Web
Formatta products provide unparalleled levels of security to both the form author and users across the Internet. Formatta’s e-forms technology incorporates unique security features to secure the form and the client data. Utilizing proven algorithms for hashing, key exchange and 128-bit encryption, Formatta technology offers security to end users and helps protect your organization from fraud.

Encryption
Encryption is necessary for the protection, privacy and non-repudiation of e-forms and data. In addition, encryption prevents any changes of form data. Formatta’s encryption algorithms are used to control form security and access, so data is always protected whether it’s posted to a website or sent via email.

Formatta’s encryption uses a set of keys with cryptographic algorithms (the set of instructions on how to use the key to encrypt the data). Once encrypted, the data can only be decrypted using one of the specified keys. Formatta’s built-in encryption strength is 128 bits - the same strength used in commercial banking applications.

Legally Binding E-forms
Formatta’s architecture keeps the form and data together during submission allowing regulated industries to keep legally binding, non-repudiable copies of the form and data as they were originally presented and submitted.

Form Verification & Validation
Formatta’s Form Verification function gives you the ability to determine if a received form was altered in any way. When completed forms are sent back to a company via the Internet, Formatta can automatically determine if the completed forms are authentic. This eliminates form tampering.

Formatta Server can automatically validate and authenticate incoming e-forms and reject unauthorized e-forms at the source, before processing.
Authentication
Authentication is necessary when the agency / business must be assured of the identity of the submitter. Formatta supports the authentication of both form publishers and form submitters, practically eliminating spoofing and fraud.

Form Signing
Formatta fully supports both User ID / PINs and X.509 digital certificates for signing e-forms. Filler users can check revocation servers to ensure the signature is valid. In addition, form authors can limit the root store for trusted certificate authorities and use Formatta Server to automatically process and validate certificates.

Secure Data Exchange
With Formatta, encrypted data can be securely exchanged between e-form authors and e-form fillers. Even if the e-form were intercepted, it could not be decrypted without the correct password.

Field Lock
Formatta allows groups of fields to be locked while other groups are unlocked. This type of encryption allows the locked data to be visible while maintaining encryption applied by the user. This is particularly useful when there is a chain of custody or when multiple users exchange the same form and need to lock and un-lock their own sections.

Form Lock
Formatta protects the design of your e-forms with our Form Lock. This feature prevents other users from modifying or otherwise changing the e-form – even if they own a copy of Formatta Designer – protecting your forms against tampering and theft.

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