

TRAINING REQUIREMENTS

Respond to each item below:

1. **Provide a training plan that will result in the training of DOC staff on all aspects of the system relevant to DOC including offender functions, system administration, investigative functions, support procedures and any other function that may impact the successful use of the system prior to cutover. Vendor shall include on-site training of up to 10 DOC staff at each facility and at DOC headquarters. The plan should include class size and any restrictions and/or limitation in connection with such training. The plan must also include annual training for new staff and refresher training for system updates (including changes to security features) or other changes.**

Vendor's response:

SECURUS HAS READ, UNDERSTANDS, AND WILL COMPLY WITH THIS REQUIREMENT.

Securus provides product training covering all features in the agreement at no cost to WA DOC. All training is conducted by experienced, certified trainers through online instructor-led classes or onsite one-on-one and classroom training sessions. Standard training is conducted using both hands-on experience with your data and using instructor demonstrations to ensure your personnel understand the processes and concepts presented. Securus' training programs enable facility staff to use all features the first day of installation. Please see attached Exhibit A for our detailed training plan.

We offer separate classes focused on different agency functions using Securus' software such as investigations, live call monitoring, administration, media services (all services delivered via a tablet), money transfer and more. Trainers will conduct a needs analysis with your command staff to identify specific training requirements for each role in your department.

In addition to standard training, Securus will develop an online training experience to meet the unique needs of your staff and facility. We offer separate classes focused on different agency functions such as investigations, live call monitoring, media services and system administration. Securus offers online instructor-led courses available twice a month throughout the year for product upgrades, new facility staff, or general refreshers. *Securus ongoing training ensures your staff always "stays on top" current and newly released features.*

Initial Training

Securus' training programs generally take place during implementation, one to two weeks prior to go-live in order to enable facility staff to use all features the first day of installation.

The average class time is 2 1/2 hours. Since our products are web-based, after a two or three-hour training session, most facility staff can easily maneuver through the system's features. A typical class size for training is 5 to 20 people, although we can accommodate whatever size to meet the needs of WA DOC.

The Securus' training team will contact designated WA DOC personnel for a pre-call 2-3 weeks before installation begins to discuss current DOC policies, procedures, and needs in order to tailor the WA DOC training plan and make change-over as smooth and seamless as possible.

Training Course Elements

Securus is committed to providing your staff with training that will maximize the potential of the features you selected. Training courses are in a user-friendly task-oriented format to teach your personnel what they need to know to do their job. Courses are often separated into modules based on the types of duties personnel tend to perform using the unique features of the product.

NextGen Secure Communications Platform™ Course Modules

Course Module	Objective
Overview and Navigation	
Dashboard	
Monitor	<ul style="list-style-type: none">• Monitor live calls• Forward Live Calls• Add Notes to Live Calls
Explore	<ul style="list-style-type: none">• Review Incarcerant Activity• Review Communication Records• Control Covert Alerts• Review System Logs• Review PAN Frequency

Investigate	<ul style="list-style-type: none"> • Open WCS
Manage	<ul style="list-style-type: none"> • Incarcerants • eMessaging
Administration	<ul style="list-style-type: none"> • Control Facility and Sites • Control Call Settings • Create Security Roles • Manage Users

The following table presents the standard NextGen SCP with Securus Video Visitation (SVV) training course modules and associated learning objectives.

NextGen SCP with SVV Course Modules

Course Module	Objective
Overview and Navigation	<ul style="list-style-type: none"> • Logging-in • Navigating through the features • Managing user password • Managing user profile • Manage system utility icons
Dashboard	<ul style="list-style-type: none"> • Review system announcements • Manage widgets
Monitor	<ul style="list-style-type: none"> • Monitor live visits • Add Notes to Live Visits
Explore	<ul style="list-style-type: none"> • Review Incarcerant Activity • Review Communication Records • Review System Logs
Investigate	<ul style="list-style-type: none"> • Open Investigator Pro • Open THREADS • Open ICER • Open WCS
Manage	<ul style="list-style-type: none"> • Incarcerants

<p style="text-align: center;">Administration</p>	<ul style="list-style-type: none"> • Install Video Client

Continuing Education

Throughout the life of the contract Washington DOC staff can receive additional training at no cost to the County. This is especially useful if any of your facilities experience turn-over and new personnel must be trained.

Additional training can be conducted through a variety of methods, which include:

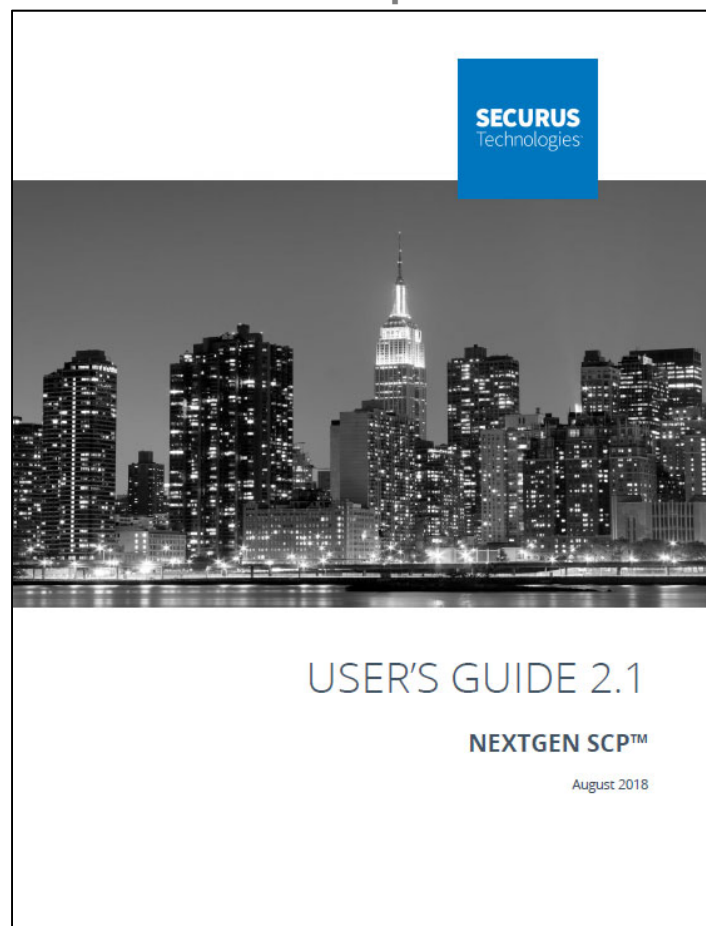
- **On-site Classes** – WA DOC can contact your account manager to request additional on-site training. Your client manager will coordinate with the training department.
- **Webinars (Initial and Overview Training)** – Live webinars are conducted on a weekly basis by our trainers. These training sessions cover all aspects of the product being covered and go in depth into the product. These sessions are targeted at new facility staff who not received any training before. Securus records our webinars so that they can be sent electronically to WA DOC for training purposes if staff miss a session.
- **Webinars (Refresher Course and Updates)** - These online instructor-led courses are also available twice a month throughout the year. These sessions focus on product upgrades or overviews for those who have already received in depth training but may simply need a refresher course.
- **Online task-based training videos** – These short videos can also be provided electronically and cover specific topic.

Self-Help Elements

Securus also provides an online self-help system available at all times from a system Help menu in the product. Keyword searching offers immediate access to the information you are seeking or you can follow the table of contents for a full learning experience.

Officers can print one topic or the entire help system if a full user manual is preferred. This method of “print what you need when you need it” ensures all printed material is updated with the current released product.

NextGen Secure Communications Platform Online Help



2. **For each of the functions of the system, the Vendor must provide documentation to the Department including, but not limited to, the following:**
- a. **Administrator guide;**
 - b. **User guide; and**
 - c. **Quick reference sheets in both English and Spanish.**

The Vendor must provide 3 copies of the documentation to each facility and headquarters. Acknowledge your acceptance of this requirement.

Vendor's response:

SECURUS HAS READ, UNDERSTANDS, AND WILL COMPLY WITH THIS REQUIREMENT.

Securus understands and accepts this requirement. Our training personnel will work with WA DOC to provide the required training materials, which will include an administrator guide, user guides, and quick reference sheets. In general, we provide a combination of hard and soft materials during training which include:

1. (Available by request) Thumb Drive with User Guide and most helpful Job Aids
2. NG SCP User Guide – soft copy always available in NG SCP Help
3. SCP HELP – Online tool that allows staff to query the SCP User Guide for step by step instructions
4. Job Aids – Handouts
 - a. Setting up Workstations
 - b. Browser Support for SCP, LBS, SVW – Technical Bulletin
 - c. How to login
 - d. Managing Numbers in the Global List (Block Numbers, Private Attorney Numbers)
 - e. SCP Call Restrictions with Call Type Descriptions
 - f. RCF – Remote Call Forwarding Detection
 - g. Using Covert Alerts
 - h. Crime Tip Quick Reference, PREA – Ways to Setup a PREA Line in SCP, Viewing Crime Tip Messages
 - i. Changing PINs in SCP, Creating Incarcerant PINs Manually Quick Reference
 - j. Investigating PIN Theft in SCP
 - k. Creating and Maintaining the Personal Allowed Number (PAN) list in SCP
 - l. Managing the PAN List in SCP
 - m. Reports – CDR Search Fields Descriptions
 - n. Reports - Global List Search Field Search Results Field Descriptions
 - o. Reports – Blocked Call Reasons Descriptions
 - p. Reports – Call Termination Reasons
 - q. Four Steps to Burn Call Recordings to a Disc
 - r. Options for Burning Call Recordings to a CD
 - s. Playing CDs Burned in SCP
 - t. Playing Encrypted SCP Calls Recordings in Court
 - u. Testifying re. Encrypted SCP Call Recordings in Court
 - v. Security Template Definitions and User Access Roles
 - w. Call Tracker and other Icons in the Reports
 - x. Incarcerant Handbook Inserts for SCP: Changing your PIN & Collecting a Refund

EXHIBIT A – TRAINING PLAN



TRAINING PLAN

Washington Department of Corrections

October 2019

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PURPOSE

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The Purpose of this Training Plan is to analyze and outline training efforts for the Washington Department of Corrections (WA DOC).

SCOPE

The scope of the training is to train members of the Washington DOC on the following Securus products:

- NextGen Securus Communication Platform (NG SCP)
- Inmate Inter-Communications Evaluating and Reporting (ICER)
- Investigator PRO (IPRO)
- THREADS
- Securus Video Visitation
- Forms and Grievance
- Tablets

Training will be conducted utilizing onsite and webinar methodologies. All training courses will include:

- Course Introductions
- Functionality of the individual products and their relationships
- Hands-on exercises

The course descriptions and allotted times are discussed later in this document.

AUDIENCE

The training will be role based and each role identified by WA DOC will have a separate training schedule.

The identified roles are:

- Facility Personnel
- System Administrators (FT/PT)
- Special Investigators
- Data Entry Specialists

INSTRUCTORS

The following Instructors will be members of the WA DOC Customer Training Team. Included is their title and years of experience.

Customer Training		
Name:	Title:	Experience:
David McTee	Instructor, Customer Training & Product Adopt	20+ years
Dean Ramsey	Instructor, Customer Training & Product Adopt	30+ years
Chris Bruton	Instructor, Customer Training & Product Adopt	13+ years
Mark Lester	Instructor, Customer Training & Product Adopt	20+ years

TRAINING DATES

Securus will conduct training sessions at each of the WA DOC facilities immediately before and/or after each component's installation.

TRAINING OUTLINE

FULL COURSE CONTENT

The following lists are a description of each main topic for the products. Securus would provide training with a focus associated to meet the functional responsibilities of the role.

NextGen Secure Communications Platform (NG SCP)

- Navigate the main menu structures
- Phone Numbers
 - Add a number
 - Block a number
 - Privileged numbers
 - Free Numbers
 - Watch List
- Create covert alerts (Incarcerant and Called Party Communication alerts)
 - Phone
 - Number
 - Incarcerant
- Incarcerant Profiles
 - Search queries
 - Add/Edit
 - Allow/Restrict Access
 - Personal Allowed Numbers (PANS)
- Communication Records
 - Generate basic and advanced search queries
 - Identify BNA
 - Create a CD of recorded calls
- Communication Controls
 - Explain Call Restrictions
 - Enable/Disable a Terminal
 - Explain 3-way call detection
 - Set Call Durations
 - Create a Call Schedule

- Monitor Calls
 - Listen to a Live Call
 - Forward a live call
- System Logs
- Administration
 - Security Roles and Templates
 - Adding and Editing Users

Investigator Pro

- Access IPRO
- Briefly explain the enrollment process
- Explain the main components
- Define High Target Calls
- Listen to a High Target Call
- Demonstrate the main components of the Call Player
- Create a Note on a recorded clip
- Delete a Note
- Add a High Interest Group to a phone number
- Demonstrate using the Suspicious Call Finder
- Demonstrate the Quick Find feature and explain the results
- Demonstrate and explain the functions of Call Finder
- Demonstrate and explain the functions of My Call Review
- Demonstrate and explain the functions of Note Manager
- Demonstrate and explain the functions of Report Maker

THREADS

- Explain the usage of Threads
- Access Threads
- Explain the User Interface and Navigation
- Generate a Threads Search
- Demonstrate the usage of workspaces/sites
- Create and Edit records, Entity Lists, Bounce Lists, and Tasks

- Demonstrate Quick Find
- Explain the Mapping of a report
- Demonstrate and explain a linkage chart
- Toggle between the two linkage charts
- Identify and explain the different categories, reports, and actions used when analyzing a THREAD Report
- Discuss the commonly used reports and their benefits
- Demonstrate the different types of Imports

Securus Video Visitation (SVV)

(NOTE: Securus provides a specific course for Investigators in SVV – this includes most of the aspects listed below but leans toward the investigative process.)

- Access SVV
- Navigate the main menu structures
- Hardware
- Advanced Capabilities
- Appointments and Permissions
 - User Access
 - Types of appointments
- Scheduling a Visit and Types of Visits
 - Public
 - Home User
 - Attorney
- Monitor Live Visits
- Administration
 - User Profiles
 - Approving a Home User
 - Exporting Profiles
 - Creating Groups
 - Visit Controls
 - Visitation Rules
 - Block/Allow Lists

- Session Viewer
 - Viewing recordings
 - Downloading Recordings

Forms and Grievances

Taking into consideration the intricacies of the rules and regulations associated with the Forms and Grievance process, our training department has developed a course specifically for this functionality. The course focuses on how Forms and Grievances assists customers in streamlining and documenting their Forms and Grievances processes. Most agencies utilize a paper-based system which may cause lost forms, delayed responses to issues, treatment, and actions, and little or no tracking of the work accomplished. Our course shows how the application corrects all of that through an automated processing of the documents. We discuss how forms are generated by Securus from the customer, user interfaces, and integrated processes to ensure the elements and properly and efficiently handled.



General Outline:

- Introduction
 - Forms
 - Grievances
- Adding a Form
- Routing Forms
 - Assignment Levels
 - Processor
 - Assigners
 - Appeals
- Types of Forms
 - Standard
 - Medical
 - Anonymous
 - Handbook Signoff
- Processing a Form
- Officer Dashboard
- System Access
- Incarcerant Processes
- Administrative Processes
 - Administrator Processes

- Assigner Functions
- Processor Functions
- Appeal Levels
- Resolution

Tablets

- Command Staff
 - Roles and Responsibilities
 - Procedural Best Practices Discussion
 - Tablet Utilization and Distribution
 - Tablet Security
- Facility Personnel
 - Functionality of the Incarcerant Tablet
 - Communication Home Accessing Forms
 - Filing a Form
 - Officer Controls
 - Distribution
 - Security

JPay Communication Center

- Facility System
- Incarcerant Kiosk

Email and VideoGram – Inbound/Outbound

This course provides a complete guideline on how to use the Email section and its accompanying reports on our Facility.JPay.com website. The features included in the Mail section allow officers and the mailroom staff to monitor interactions between incarcerants and their family and friends (users). Training includes information on:

- Approval/Denial capabilities
- Inbound Mail
- Outbound Mail
- Search and Printing Capabilities
- Reports

- Free Text Search
- Suspend Incarcerant and Restrict Customer Videograms
-

Money Transfer

This training provides a complete guide to viewing money transfers and accompanying reports on our Facility.JPay.com. Training includes information on:

- Logging In
- Administration
- Deposit History and Reports
 - Weekly Deposit Report
 - Monthly Totals Report
- Searching money transfers by incarcerant, customer or transaction information

Intel

This training provides a guideline to using the Intel section of the Facility.JPay.com website. The features included in the Intel section allow officers and investigators to analyze, monitor, and report on a wide range of incarcerant communications, relationships, activity history, and interactions with JPay products and services.

- Intel Map Search
- Search – Incarcerant ID or Customer ID
- Exporting and Printing Reports
- Incarcerant Frequency Report
- Find Incarcerants Relation
- Router Detection
- Suspicious Criteria
- Alerts
- Incarcerant/Customer Watch List
- Mail Keyword Search

Release Card

This document provides a complete guideline on how to manage release cards on our website facility.jpays.com.

- Login
- Administration

- Activation and Operation
- Bank Report

METHODOLOGY

Registration

All students, regardless of the type of course (webinar or onsite), can register for their classes online. A registration email will be sent to the associated Command Staff for distribution to their personnel. Students can then utilize the hyperlink in that email for registration.

Training

Securus shall provide multiple facility specific training sessions based on user group levels

Based on past experiences with technical training classes, if possible, each student should have an available computer to follow along and practice the procedures being trained. Whenever possible, classes should be full to maximize training time, resources, and dollars. However, the training schedule recognizes the fact that not all members of some departments cannot be gone at the same time and will accommodate WA DOC.

A combination of webinar and onsite training can be implemented to best meet the needs of the client.

Onsite

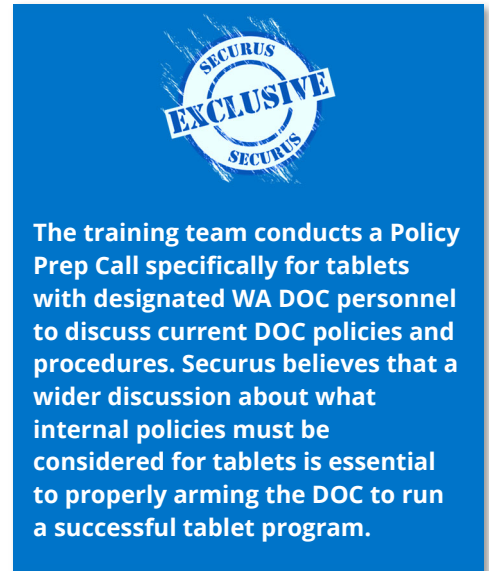
Securus can provide onsite training for each of WA DOC 13 locations for Facility personnel.

Regional Training

Securus can provide Regional training for full-time system administrators, part-time system administrators, special investigators, and data entry specialists. The locations and associated schedules will be developed based on the regions identified.

Ongoing Training

Based on the need of the facility/group, Securus can provide ongoing system training on each of the listed products to train new and additional personnel. Depending on the number of personnel to be trained and the products, Securus can either perform onsite or webinar-based training to best meet the needs of the client.



Role-based Training

The training will be Role Based and each role identified by WA DOC could have a separate training schedule. Each role would be trained in all of the primary functions of the products they are authorized to use based on their security access. Securus' Trainers will work with WA DOC to identify the best curriculum for each role.

Securus would tailor the curriculum to accomplish role-based training for example as follows:

System Administrators will be provided an in-depth program of the functionality of each of the products. The System Administrator needs a full understanding of each application's processes. Additionally, the System Administrator needs to understand security access, rules, responsibilities, and User Management.

Special Investigators will be provided training in each of the products with a strong focus on the investigative procedures and features and how to best utilize these to aid in their investigations.

Facility Staff, which would tentatively include Line Supervisors and Correctional Officers with approved access would include the procedures associated with the administrative and control aspects of the products associated with the day-to-day operations of the facility.

Data Entry Specialists would be provided training, based on their security access, relating to entering and editing incarcerant profiles, tablet utilization and distribution, scheduling visits in SVV, and other applicable and approved procedures as deemed necessary by the local facility.

Incarcerants

- SCP: Dialing instructions can be mounted on each phone, and added to ConnectUs as a document.
- SVV: ConnectUs provides a 2-minute instructional video. Various instructions can be posted as documents on ConnectUs.
- If WA DOC has educational broadcast capability via TVs, we can create a short video to run frequently over internal channels.

Training Phased Rollout

Based on the tentative product rollout, and to best present the products while minimizing student overload of content and to ensure a positive rollout of products and training together. Securus recommends a phased rollout of the training to coincide with the products as they are made live at each facility.

For example, Phase 1 may include NG SCP, ICER/IPRO, Threads; Phase Two may include either SVV or Tablets, or both.

Securus can also provide pre go live training to better assist the users prior to the actual go-live events. Typically, this training is web-based and provides overview of the functionality of each product.