

PLAN FIRST *TECHNOLOGIES*

Managed Services

Introduction

The staff and leadership at Plan First Technologies are constantly building on our knowledge in the world of IT to keep up with the constantly changing landscape. Plan First Technologies has the knowledge in the identified areas and is excited at the opportunity to learn more about how we can assist you with aligning your IT with your business needs.

With a highly diverse and dedicated team at your service you will be able to rest easy knowing that we have the knowledge, skills, and personnel to handle your agency's IT needs. We have technical resources with many years of varying technical experience at your disposal. Also, our full-time office staff will handle everything related to invoicing and scheduling.

Our primary focus is getting our clients in a steady run state with regards to IT - to a point where they do not have to think about their IT systems. We accomplish this by making sure your IT infrastructure is in excellent shape and able to handle your day-to-day networking and computing needs with maximum uptime and reliability. When your IT systems are in a steady run state, we can focus on working together to leverage IT to enhance business efficiency and solve business needs.

This document describes in detail the services delivered to clients under Plan First Technologies Managed Services solution. Our managed services are designed to proactively maintain servers and workstations by delivering regular maintenance, monitoring, and management. These services are designed to reduce the likelihood and impact of an unwanted technology failure for a fixed monthly price.

Server and Network Services

Managed Services include the following:

- Server Performance monitoring and alerting
- Network appliance monitoring and alerting
- Wireless system monitoring and support
- Firewall monitoring and support
- Scheduled server preventative maintenance (weekly reboots)
- VPN management and setup
- Network printer setup and support
- Analysis of security testing
- Application maintenance and support

Scheduled preventative maintenance:

- Windows Patch Management (reboots)
- Maintain and manage server hardware
- Clean Windows Update cache
- Sync time with DC
- Daily temp file maintenance
- Physical cleanout of server during regular business hours

Workstation & Printer Services

Managed Services for workstations include the following:

- Advanced performance monitoring
- OS & Third-Party patch management (reboots)
- Scheduled preventative maintenance
- Preparing PCs for deployment, reassignment, or destruction (including the various standard setup with two monitors required for remote workers, executive employees, & other staff depending on their job requirements)
- Remote setup and configuration of workstations
- Email address setup / removal and troubleshooting
- Daily technical support for staff
- Printer troubleshooting & end user support
- Integration with various peripherals (tablets, smart phones, handhelds, etc.)
- Application maintenance and support

**Problems occurring as the result of installation of unapproved software or hardware, or user adapted settings are not included in the Managed Services. **

Scheduled preventative maintenance:

- Windows patch management (reboots)
- Third-Party patch management
- Daily temp file maintenance

Advanced performance monitoring – both for server and workstation

The Plan First Technologies Managed Services monitors the health of your servers and workstations and identifies issues that may impact their performance. Identified issues are raised to the customer for remediation approval.

Performance monitoring includes:

- CPU Usage
- Disk Space
- Patch Status
- Memory Utilization

Security

Managed Antivirus – Both for Server and Workstation

Plan First Technologies integrated Antivirus allows our staff of technicians to actively monitor, manage, and update deployed devices; ensuring that your business is protected and secure.

Plan First Technologies supported Antivirus software services includes:

- Signature updates (reboots)
- Status & threat monitoring
- Scheduled scans
- Software updates
- Simple virus / malware removals on individual machines

General Services

Plan First Technologies will consult with our managed clients on the following:

- IT meetings, preparation, and planning services
- High level review of IT policies & procedures
- Preparation of project quotes
- Procurement management
- Knowledge of disaster recovery methods and remote back up
- Asset inventory management
- Cyber security guidelines & systems
- General technology explanations & advice
- Monthly patch audit & status report

Consultations between Plan First Technologies and our clients are our best effort to assist clients with day-to-day situations, if any problems arise due to a consultation, Plan First Technologies will not be responsible for that issue, but we will give our best effort to assist with any issues. The world of technology is fast and ever changing, we are here to provide you with our best effort recommendations.

Devices Covered by the Managed Services

Only legally licensed Windows Pro based devices classified as Desktop, Laptop, or Server computers will receive full coverage of our Managed Services, restrictions apply. Other critical business-related network devices such as Smart Switches or Firewalls will also be covered with limited monitoring by Plan First Technologies, restrictions apply. All other device coverage will be determined by Plan First Technologies, Inc.

The following services are not included by managed services:

- All hardware or replacement parts
- Remediation of identified issues from security testing
- End user training
- Major hardware or software projects
- Backup restoration & recovery
- Office relocation services
- Support required because issues resulting from inadequate or deficient client owned hardware.
- Hardware installation – If it is more than 3 workstations or part of a predetermined project
- Onsite support – other than necessary to accomplish included services
- Voice/VOIP – by others
- IT security – other than described above
- Disaster recovery
- Software license management
- Physical maintenance of printers
- Cost of backup solution
- Travel to any location not within Tompkins & Cortland County – would be billed using current IRS mileage rates.
- Initial onboarding for our Managed Services – this would be billed as a project
- Service and support of analog fax machines and analog fax services.
- Failure due to acts of God, building modifications, power failures, or other adverse environmental conditions or factors.
- Programming (modification of software code) and program (software) maintenance
- Any unexpected item or service not explicitly included in this scope of services

Hourly Rates

Any services not included within the scope of this program will be billed at the current Plan First Technologies hourly rate. Plan First Technologies hourly rates are subject to change

Please contact us with any questions regarding our current rates.

Support Levels

Support Level	Description
Level 1 Support	All support incidents begin in Level 1, where the initial service ticket is created, the issue is identified and clearly documented, and basic hardware/software troubleshooting is initiated. All support incidents that cannot be resolved with Level 1 Support are escalated to Level 2.
Level 2 Support	Including but not limited to workstation support and troubleshooting. Service requests that cannot be resolved by Level 2 support are escalated to Level 3.
Level 3 Support	Including but not limited to server and network support and troubleshooting. High end workstation support.

Response and Escalation Times

The table below outlines our targeted response times for service tickets under our Managed Services Agreement. These response times do not apply for service calls where hourly rates apply. These response times apply to normal business hours.

Issue	Priority	Response Time
Services unavailable, all users affected.	1	Within 1 hour
Significant breakdown of services, large number of users affected.	2	Within 8 hours
Limited breakdown of services, limited users affected, modified business services can continue.	3	Within 24 hours
Small breakdown of services, one user affected.	4	Within 72 hours

Onsite & Remote Operations

Plan First Technologies has the discretion to dispatch technicians to work onsite or remotely for a client. Having technicians work remotely will be a priority before sending technicians onsite, although, when necessary, technicians will go onsite. All on site work will be approved by the client prior to dispatching technicians.

Communication & Notifications

- Emails sent from Plan First Technologies using the domains “p1tech.net” or “p1tech.com” are the official means of communication between Plan First Technologies and clients, any other email senders are not the official Plan First Technologies, Inc.
- Communication between Plan First Technologies and the client must be done via email or written text regarding this agreement or services provided.
- Our quarterly newsletter or weekly notices are a way for our clients to stay notified about their Managed IT Services. Critical and important information will be shared through these newsletters or notices. This is an acknowledgement of the newsletter.

Acknowledgement of Managed Services

Services specifically listed as included throughout this document are included within Plan First Technologies Managed Services. Other services may be determined on a case-by-case basis.

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Terms & Conditions

Terms and Conditions

1. **Response Times** – All managed services instances requiring response from Plan First Technologies can expect a first contact response within 1 business day during Plan First Technologies regular business hours.
2. **Quarterly Device Audits** - Plan First Technologies will perform quarterly audits of all managed service devices within the client’s business network. All changes in workstation and server counts that require coverage under Plan First Technologies managed services will result in changes to the client’s monthly invoice. No adjustment will be made to billing without first informing the client.
3. **Adding and Removing Devices** - Devices from Plan First Technologies monitoring system will be handled between Plan First Technologies and the client in the following ways.
 - a. **Adding Devices** will require approval of an administrative contact provided by the client.
 - b. **Removing Devices** will require that the administrative contact requests or accepts removal of the device(s).
 - c. Client device counts will be updated for invoicing during quarterly device audits, not at the time of adding or removing the device.
 - d. Plan First Technologies, Inc will not be responsible for devices that were not requested to be added or removed from the managed service system.
4. **Cancellation** - If you decide within the first 60 days of service you would like to cancel, no written notice is required to cancel. After the first 60 days of service Plan First Technologies requires a 30-day written cancellation notice from the client. After the 30-day cancellation period all services will be severed from the Plan First Technologies managed services system. Plan First Technologies may terminate services with a client by providing them with a 30-day written cancellation notice, after the 30-day period, services may be severed from the client.

5. **Non-Managed Devices** – Any client devices/hardware/services that are not covered by Plan First Technologies managed services will not be covered by the managed services agreement. Non-Managed devices are subject to Plan First Technologies standard hourly rates.
6. **Managed Services Agreement** – This agreement supersedes all previous versions/variants of the Plan First Technologies managed services agreement.
7. **Device Covered by Managed Services** - Only legally licensed Windows based devices classified as Desktop, Laptop, or Server computers will receive full coverage of our Managed System, restrictions apply. Other critical business-related network devices such as Smart Switches or Firewalls will also be covered with limited monitoring by Plan First Technologies, restrictions apply. All other device coverage will be determined by Plan First Technologies, Inc.
8. **Warranties and Liability** - Problems occurring as the result of installation of unapproved software or hardware or user adapted settings are not included in the Managed Services program. The maximum liability amount is equal to the amount of two months of this agreement.
9. **Venue** - Any actions or proceedings brought arising out of the Managed Services Program, or this agreement shall be venued in Cortland County, New York.
10. **HIPAA Compliance** - The parties agree that, to the extent required by Legal Requirements, the services provided under this Agreement will comply in all material respects with all federal and state-mandated regulations, rules, or orders applicable to the services provided herein, including but not limited to regulations promulgated under Title II, Subtitle F of the Health Insurance Portability and Accountability Act (Public Law 104-91) (“HIPAA”).
11. **Data** – No client data is collected by Plan First Technologies to be sold or shared with outside parties; your data is yours. Plan First Technologies is not responsible for the loss of client data on devices that are being covered under the managed services or any devices affiliated with the managed network. Backup services that are being provided are covered under their own agreements.
12. **Add on Services** - All Add on services must be agreed upon between Plan First Technologies and the client via a written document.
13. **Maintenance & Reboots** – Plan First Technologies is not responsible or liable for any loss or failure incurred during preventative maintenance. Plan First Technologies will aid in the recovery of the loss or failure.
14. **Agreement Renewal** – This agreement is perpetual until cancellation is requested as stated in “Terms & Conditions” section 4.
15. **Unforeseen Event** - Neither party shall be responsible for any delay nor failure to perform due to causes beyond reasonable control of the party, including, but not limited to, because such as strikes, lockouts, or other labor disputes, riots, civil disturbances, actions or inactions of governmental authorities or suppliers, epidemics, war, utility outages, embargoes, severe

weather, fire, earthquakes, acts of God or the public enemy, nuclear disasters, or default of a common carrier.

16. **Billing and Payment** - Plan First Technologies will issue invoices monthly. Payment shall be made within 30 days. Payments made after 30 days will be charged 3% interest.
17. **Annual Rate Adjustments** –Plan First Technologies reserves the right to apply a 3% annual price adjustment or rate increase. Price adjustments are not guaranteed to happen every year.
18. **Hours of Operation** – Plan First Technologies standard hours of operations are listed on the website <https://www.p1tech.net> and are the official hours of operation for the company. All additional time and rates are to be determined by Plan First Technologies.

Client & Plan First Technologies Agreement of the “Managed Services” & “Terms and Conditions”

Plan First Technologies

Full Name: _____

Title: _____

Signature: _____

Date: _____

Client

Company: _____

Full Name: _____

Title: _____

Signature: _____

Date: _____