

STATEMENT OF WORK FOR SUBSCRIPTION SERVICE ATTACHMENT B

1. Introduction

With regard to this proposed contract, EBSCO's objective is to provide outstanding subscription services to Texas Southern University in the following ways:

- Assign personal account representative accessible to the library staff via e-mail, direct phone, direct 800 phone, mail and fax,
- Place orders for serials and periodicals quickly and accurately, and publisher permitting, run them to a common expiration date,
- Provide price quotes on back issues and new subscriptions as requested by the library,
- Respond to all requests from the library staff quickly and accurately,
- Place claims within 72 hours and follow up quickly and accurately,
- Make address and other changes requested by the library quickly and accurately,
- Visit the library upon request or as necessary to ensure exemplary services, and work closely with the staff to tailor our services to their needs and to respond to the library's changing requirements.

1.1 EBSCONET®: EBSCONET® Subscription Management, our online subscription and e-resource management platform, is available to you 24 hours a day, 7 days a week. It is the premier serials management system used by libraries worldwide and is a value-added service provided at no charge to you.

EBSCONET is designed to be an interactive platform where customers can not only view comprehensive details about their subscription accounts but can also communicate and exchange data with EBSCO in a variety of ways, including through the Customer Service Portal and comprehensive online renewal tools.

With EBSCONET, you can search the entire EBSCO catalog as well as your current and past orders. EBSCONET lets you:

- Search our title database and view title details for more than 395,000 titles from 80,000 publishers worldwide
- Place orders
- View real-time information about your orders

- Access historical order information for up to seven years (in detail) and order history at the title level back to the mid-1990s
- Manage renewals for individual titles and e-journal packages
- View detailed information about publishers' online access policies and license terms
- Generate and download reports, and use the EBSCONET Analytics tool to evaluate your collection using a variety of facets
- Place and follow up on claims
- Report and track subscription-related issues via our Customer Service Portal
- Receive title notifications advising you of important changes to your subscriptions, including changes in publisher, frequency, number of issues, format, and title status
- Download copies of invoices, credit memos and monthly account statements

EBSCONET is specifically designed to help you manage each stage of the subscription life cycle and empowers you to make informed, timely decisions about the resources you have on order.

Flexible account permissions allow libraries to create an unlimited number of administrative accounts, as well as multiple user accounts for individual library staff, providing them with access only to the features they need. Staff accounts can be restricted to read-only access or allow full editing functionality with multiple levels of user authorization, allowing you to tailor *EBSCONET* access to your library's needs and workflow.

You can also use EBSCONET to determine whether alternative formats are available or if a title is available in a publisher package. The publisher's terms and conditions are clearly displayed so you can view their policies on orders, cancellations and claims. You can also review publisher access information (including URLs), license details and pricing models for online titles.

1.2 Dedicated Account Representative: Sandra Howitt is the Customer Service Representative assigned to personally handle any questions you have concerning orders, delivery, claims, renewals, e-journal access and troubleshooting. She is also available to assist with management reports, invoices, credits and any other requests related to your subscription account. EBSCO's Customer Service Representatives are empowered to call publishers on your behalf to resolve claims and other issues. In addition, they are experts in e-resources and receive training specifically on managing e-journals and e-packages.

Sandra also has access to invoice and order history records and can quickly locate information about your subscriptions. Sandra can be reached via a direct toll-free number 855-258-6993 or by e-mail at showitt@ebSCO.com.

All of EBSCO's Customer Service Representatives work in dedicated teams, sharing common issues and proposing solutions. Their team structure encourages collaboration and ensures the best service for your account. In the event your primary Customer Service Representative is out of the office, another Customer Service Representative who handles similar accounts will be able to assist you, ensuring consistently prompt response to communications.

- 1.3 Management Reports:** Twenty-seven management reports are available at no charge via *EBSCONET*. Of those, 17 are available online and generate in real time; the remaining 10 are on a request/retrieve, 24-hour turnaround basis (generated overnight). *EBSCONET*'s report schedule also allows you to set up recurring requests for reports. You can customize online reports to include specific data elements and export them easily in Excel, HTML, comma-delimited, tab-delimited and XML formats.

Additional custom reports are available upon request through your Customer Service Representative. Simply let them know what data you are interested in and they will request a special report to accommodate your needs.

EBSCO provides management reports to our customers at **no additional charge**.

- 1.4 Invoices:** In addition to requesting payment, EBSCO's invoice provides pertinent and current bibliographic information to customers to help them control their serials collections.

Additional billings may sometimes be necessary when EBSCO has not been advised in advance of subscription rate changes or when publishers set prices after the order is placed. In these cases, we generate supplementary invoices and issue them monthly.

Invoice data is available on paper, electronically or via Electronic Data Interchange (EDI) with the ILS (depending upon availability). You can view invoices and current and previous monthly statements (which reflect payments and credits) via the Financial Information tab on *EBSCONET*. *EBSCONET* also indicates the balance of each invoice or credit.

- 1.5 Electronic Data Interchange:** EBSCO manages an array of Electronic Data Interchange (EDI) activities. With 250 completed interfaces to more than 100 integrated library systems, EBSCO leads the industry in the development of linkage between our serials control systems and the systems used by our customers. We also electronically exchange information with publishers and other information providers. Our Information Systems & Services staff continues to play a leadership role in the development of ANSI (American National Standards Institute) Standard X12 and its application to the serials industry. EBSCO is committed to streamlining the electronic exchange of data to save time and money for serials managers and providers.

EBSCO offers the following EDI services at no charge to assist customers in managing their serials.

Electronic transitional services

Electronic Invoices: EBSCO offers invoices on diskette, magnetic tape or cartridge, or via Internet File Transfer Protocol (FTP) for loading into automated library systems or into a PC for further manipulation with popular spreadsheet and database programs. In addition to pricing data, each invoice record contains up to 40 fields, including title name, ISSN, start date and publication frequency.

Electronic Ordering, claiming and management reports

Ordering: Customers can load order data into a transmittable file and electronically

transmit it to EBSCO from a local ILS. Alternatively, customers can log onto our EBSCONET system and enter orders on a pre-formatted order screen.

Claiming: Customers can transmit claims data to EBSCO from their local ILS depending on their system capability.

Management Reports: EBSCO can provide raw report data via Internet FTP, and customers can use the data to create their own reports.

- 1.6 Order Processing:** To process customer orders, EBSCO Customer Service Representatives select the appropriate title or edition from our online title database, select the appropriate term or period as requested by the customer or required by the publisher, select the correct bill-to and ship-to address for each title and activate the order function. Order activation produces a printed or electronic order form with an accompanying check or electronic payment to the publisher or fulfillment center. Order activation also produces a printed or electronic invoice to the customer.

Orders can be placed via phone, fax, e-mail, mail or *EBSCONET*. EBSCO's standard turn-around time for placement of new orders is three working days for titles already available in our title database. If a title is not listed in our database, we will place the order as soon as possible following receipt of rate and order placement information from the publishers.

We will request indexes, special issues, unnumbered supplements and other materials included in the basic subscription price. We will notify the agency of supplements, which are not supplied on subscription, so orders may be issued.

Upon request, orders will be placed and maintained to run on a calendar year basis where possible. If a title is not currently on a calendar year cycle, EBSCO can sometimes place orders requesting that the publishers adjust the subscription term to meet a common expiration date of December.

- 1.7 Claims:** EBSCO has developed several unique, time-saving claims systems, reports and procedures to make serials transactions as trouble-free as possible. You can make a claim in the way that best meets your needs:

- To your Customer Service Representative by e-mail, phone or fax.
- Through EBSCONET®, our complimentary subscription management tool.
- Via EDI (electronic data interchange) through your ILS (if available).

We process claims daily, and you can review a list of all the claims submitted that day. We have a variety of tools that allow you to manage claims and track the status of your claims. These include:

- EBSCONET® Claim Checker to track claims
- Publisher responses viewable online
- Claim report summary
- Publisher dispatch dates
- Expected volume and issue information

- EBSCO Missing Copy Bank®, a one- to two-year back file of 48,000 issues from approximately 2,000 popular serials titles

Titles with Claiming Restrictions

Claim restriction information is displayed on the title detail page in *EBSCONET*® and is also available via the Titles with Claiming Restrictions report. This report identifies the titles in your collection that have publisher claiming restrictions. This information helps you avoid unnecessary claims and informs you of the publisher-allotted time frame for claiming.

Claim Follow-Up

EBSCO's Monthly *Claim Checker*® allows you to review and manage your claims online anytime.

- You can review, evaluate and indicate how you want us to proceed with each claim.

Also, the My Claims section of *EBSCONET*® provides information on claims placed within the past two years. Claim history is available at the individual order level within your order history on *EBSCONET*®, and a Claims Processed report is available to download on demand. You can also contact your Customer Service Representative at any time and he or she will update you on the status of your claim.

Proof of Payment

One of the most common publisher responses when making claims is that they cannot locate the order. To reduce this response, for all claims, EBSCO provides the check number, date of check, and date it was cashed. If this information is sufficient, it is not necessary to send proof of payment. If they are still unable to find the order, then proof of payment is sent upon publisher request.

- 1.8 Cancellations:** If an order is cancelled prior to expiration, EBSCO will notify the publisher and process the cancellation for you, unless a publisher has identified the title as non-cancelable. If an order is canceled, we will credit your account an amount equal to what we are refunded by the publisher, less a processing fee of thirty dollars (\$30.00). In some cases, publishers will not issue refunds but will instead offer credits for publications or other provisions. EBSCO will pass on to you whatever credit we are allowed by the publisher.
- 1.9 EBSCO's Standard Terms and Conditions:** This agreement incorporates the terms and conditions located at: <https://journals.ebsco.com/about/terms-and-conditions>, provided that in the event of conflict this agreement will prevail.