



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia Delivery Order

Order Date: 04-09-2024

CORRECT ORDER NUMBER MUST APPEAR
 ON ALL PACKAGES, INVOICES, AND
 SHIPPING PAPERS. QUESTIONS
 CONCERNING THIS ORDER SHOULD BE
 DIRECTED TO THE DEPARTMENT
 CONTACT.

Order Number:	CDO 0511 3818 MIS2400000008 1	Procurement Folder:	1410530
Document Name:	WV PATH Summer EBT	Reason for Modification:	
Document Description:	Phase 1		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR1800000007 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR				DEPARTMENT CONTACT	
Vendor Customer Code:	000000184667			Requestor Name:	Kimberly A Beckett
OPTUMINSIGHT INC 11000 OPTUM CIR				Requestor Phone:	(304) 558-5906
EDEN PRAIRIE MN 55344				Requestor Email:	kimberly.a.beckett@wv.gov
US					
Vendor Contact Phone:	612-642-7749	Extension:			
Discount Details:					
	Discount Allowed	Discount Percentage	Discount Days		
#1	No	0.0000	0	<div style="font-size: 2em; font-weight: bold;">24</div> FILE LOCATION _____	
#2	No				
#3	No				
#4	No				

INVOICE TO	SHIP TO
BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE ONE DAVIS SQUARE, RM 211 CHARLESTON WV 25301 US	BUYER - 304-957-0209 HEALTH AND HUMAN RESOURCES MANAGEMENT INFORMATION SERVICE 321 CAPITOL ST, STE 200 CHARLESTON WV 25301 US

Total Order Amount:	\$358,400.00
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Purchasing Division's File Copy

CH 4/15/24
 PURCHASING DIVISION AUTHORIZATION
 DATE: *Turaha 4/15/2024*
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
 DATE: *4-15-24*
 ELECTRONIC SIGNATURE ON FILE

Extended Description:

SOW for WV PATH Family Ass. Summer EBT Phase 1-OPTUM will complete the Requirements, Design, Development, Testing for the initial issuance of S-EBT Benefits and also complete the initial issuance of S-EBT Benefits. OPTUM will provide Release Management, Business Analyst, and Project Management activities during Phase 1.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	81111511	0.00000		\$0.0000	\$358,400.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-04-10	2024-11-16			2024-04-23	

Commodity Line Description: Modifications and Enhancements Year 7 Hourly Rate

Extended Description:

Modifications and Enhancements Year 7 Hourly Rate 2800 hours at \$128.00 per hour

1 Cost Proposal Introduction

Optum is pleased to submit this Cost Proposal for West Virginia's Integrated Eligibility Solution (IES) RFP. Our solution is truly modular, modern, and outcomes driven using partners and products that are known and used by DHHR and the State of West Virginia. We have taken an approach to reuse and COTS that is very different from a traditional transfer approach. The traditional approach requires customization of previously delivered monolithic systems that are glued together for use in a new state. Our modular approach achieves a much lower total cost of ownership and reduced operations and maintenance (O&M) costs using a loosely coupled integration through a common integration framework.

Optum developed our cost estimate for the WV IES by following a bottoms-up approach that considered all of the requirements in the RFP. We matched the requirements against our existing IE product functionality and solutions from our partner organizations. We then sized the remaining requirements that require configuration or development. This sizing and estimation process was based on our experience developing large scale health and human services systems. Industry standards were applied to arrive at the full DDI cost that spans all phases of the software development lifecycle. Costs were reviewed and refined based on feedback from subject matter experts as well as our existing knowledge of the size and complexity of current systems supporting West Virginia.

Similarly, M&O costs were modeled and estimated based on our experience and expertise managing large scale systems. We have many years' of actual M&O activity data, and we used that data to model the WV IES work effort. This model is based on similar system profiles and implementations and takes into account cross-module efficiencies. These costs were also vetted extensively to confirm that Optum is keeping costs as low as possible while still ensuring we are providing a fully ITIL-compliant operation.

Infrastructure costs were based on models of the computing power needed to host the WV IES, and take advantage of the economies of scale Optum can provide through our own data centers that currently support thousands of customer applications.

Our Purchasing Affidavit is provided in Appendix 3 of our Technical Proposal response.

2 Costing Assumptions

In the following table, we document the assumptions we used while developing our cost proposal.

#	Cost Assumption
1	Tools and accelerators may be deployed and used during the transformation of the OSCAR application. Any customization to these tools and accelerators by Optum or its subcontractors will be at our own cost, and will be completed to support the automated transformation of programs written in the Natural programming language. The State of West Virginia shall not claim any ownership rights to these tools and accelerators.
2	All sizing, user counts, current system configuration detail, and software licensing counts are based on information from the RFP, the Procurement Library, and the subsequent answers to vendor questions provided by DHHR.
3	We will leverage West Virginia's Northwood's document management solution, which includes the State's current document repository (Hyland Onbase), and the State's current document imaging and workflow (Compass).
4	We assumed that the State's mailroom will capture and scan all paper documents in the same manner they do today in support of the legacy solution.
5	The project plan is contingent upon timely State decisions, availability of subject matter experts, and provision of requested data (e.g. for data conversion) throughout the life of the contract.
6	Optum assumes that a remote backup facility means a place where full and incremental backups of the system will be stored.
7	The DDI schedule assumed a start date of September 25, 2017. Any deviation from this start date may result in changes to the milestone and delivery dates shown in the proposal and in the draft Detailed Project Schedule.
8	The DDI schedule assumes a pilot for most of the releases, consisting of 1-2 counties per pilot, and assumes that the State resources for the selected pilot counties will be able to participate and provide feedback during the pilot period.
9	Sample Natural programs of the OSCAR system shall be supplied to Optum during customization to verify the effectiveness of transformation and further fine-tuning to derive maximum efficiency of automation.
10	After acceptance of the design of the new WV IES domain model, any changes to that domain model or data conversion scripts due to subsequent changes to the legacy applications (e.g. OSCAR, FACTS, RAPIDS) will be handled through a change management process.
11	Entrance and exit criteria for each DDI phase will be mutually agreed upon and will be the basis for determining the commencement/conclusion for each phase. For example, the entry point for the pilots will assume a certain level of acceptable defects (e.g., zero Severity 1 and 2 defects).
12	Our pricing assumes we are afforded an opportunity to discuss with the State payment terms that includes the approval process around deliverable acceptance of milestones, and to have the resulting contract reflect these terms and process.
13	In the event specifications only reference "based on West Virginia business rules" or "defined by the state", and are not further defined, our interpretation is that such specifications meet federal regulations and requirements.

Cost Assumption	
14	Optum is proposing a complete solution for the State's acceptance in year three. Optum is assuming responsibility for those expenses required to obtain and maintain access to State systems, such as the hardware/software, network infrastructure, and any licensing costs. Consistent with the State's instruction to include maintenance and operations costs only after acceptance of the complete solution, Optum has included those expenses as part of the DDI cost in contract years one and two.
15	Optum will take over existing computing costs, as necessary, through modernization. We assumed the current West Virginia mainframe chargeback is: <ul style="list-style-type: none"> • \$70k/month for Mainframe Batch Cost • \$143k/month for Mainframe Online Cost These costs are reflected as part of the modernization effort.
16	We assume we will be allowed use the State's licenses until they expire. Upon expiration, we will assume the cost of the new licenses. The State will transfer the legacy licenses where permissible. Otherwise, Optum will manage and pay the maintenance cost of software licenses on behalf of the State.
17	Legacy system licensing fees paid by Optum will continue until respective systems go-live into production.
18	Based on materials provided in the procurement library, West Virginia has a benefit population of 750,000. We assumed that 300,000 documents will require e-signatures.
19	We assume the State will continue to provide M&O support for legacy FACTS and OSCAR until the modernization of these systems is implemented. At that time, Optum will provide M&O services for child welfare and child support functionality.
20	Based on the "DOC064_Alerts, Reports, Letters, Forms, Notices, and Interfaces Inventory" worksheet provided in the procurement library and on the requirement specified in Section 4.3.11 that we should assume a five percent reduction in the number of reports, forms/notices/letters, and alerts, we have estimated the number of reports that will need to be converted or developed for use with the existing data marts is 796, of which 319 are currently Cognos reports and 477 are either not currently Cognos reports or are new reports.
21	We are assuming we will use the state's existing Informatica MDM solution.
22	Optum and the State will work together to optimize data processing in legacy systems prior to conversion, with the objective of minimizing additional conversion activities later.
23	Once legacy data has been migrated to the WV IES, that same data will not be migrated back to any legacy systems.
24	Any delays or inability to meet the project plan due to current DHHR third-party vendors' existing contractual obligations, which are outside Optum's control, are the State's responsibility to resolve.
25	The State will supply telephone and access numbers for the State AVRS/IVR solution at their cost.
26	We assumed that the AVRS/IVR will route calls to the existing State AVRS/IVR via the existing toll-free number used by the State.
27	Call volume estimates are based on information provided in the RFP and in the Procurement Library. Optum has projected 3,000 Technical Support Call Center contacts monthly.

#	Cost Assumption
28	Our pricing assumes that software whose functionality must be accessed by the State, licensing shall be for external use. For software that is simply part of Optum's set of tools provided to deliver RFP-required services, Optum will obtain licenses for our internal use but in support of the State.
29	License assumptions are based on the quantities provided in the license inventory list in the Procurement Library. Additional users required to accommodate growth may be subject to RFP Sections 5.25 and 5.50.
30	Optum assumes that the license access rights provided by Optum to the State for software provided under a software-as-a-service model will be used by the State solely in conjunction with the WV IES project, and not used independent of such services or applications unless mutually agreed.
31	Optum assumes that existing external integrations present in the Oracle SOA ESB will be reused as part of the WV IES, in conjunction with Optum's integration layer.
32	Optum can make no claims nor retain responsibility for public Internet performance or failures of individual users' private ISP performance or failures. Optum will make every effort to design solutions with normal Internet functioning in mind.
33	We are assuming that we will leverage West Virginia's provider management solution for all Medicaid and non-Medicaid providers, with the exception of the Childcare providers.
34	Our proposed security approach will be used for the new WV IES platform and does not implement new security to legacy FACTS, OSCAR or RAPIDS application environments.
35	Optum assumed a maximum of 2,000 Child Care Provider log-ins/month when sizing this portion of the IES.

3. Attachment C: Cost Sheet

Our approach includes a separate pool capped at \$50,000 per year, as per Mandatory Requirement 5.50, reserved for modifications and enhancements that translate to direct costs rather than hours. The Agency would approve such costs through the change management process to be agreed upon after contract award.

Table 12: Design, Development & Implementation (DDI) Cost

Design, Development & Implementation (DDI)	
Item	Total
Total DDI Costs (See Appendix II: Deliverables, Milestones, and Payments)	\$ 162,675,000

Table 13: Maintenance and Operations (M&O) Cost

Maintenance and Operations (M&O)		
Period	Monthly Cost	Total (Monthly Cost x 12 Months)
Year 1*	\$ 0.00	\$ 0.00
Year 2	\$ 0.00	\$ 0.00
Year 3	\$ 1,432,667	\$ 17,192,000
Year 4	\$ 1,251,500	\$ 15,018,000
Year 5	\$ 1,162,083	\$ 13,945,000
Year 6	\$ 1,083,500	\$ 13,002,000
Year 7	\$ 1,076,667	\$ 12,920,000
Year 8	\$ 1,089,500	\$ 13,074,000
Year 9	\$ 1,117,833	\$ 13,414,000
Year 10	\$ 1,147,083	\$ 13,765,000
All Inclusive Maintenance and Operations Cost	GRAND TOTAL	\$ 112,330,000

*As described above, for purposes of proposal and evaluation, all vendors should estimate operations cost for Year 1 at zero dollars (\$0) in order to provide consistent evaluation of all cost bids. The Vendor should begin to include Operations and Maintenance costs in the year they plan to submit the complete solution (all modules and supporting functionality) for DHHR acceptance.

Table 14: Modifications and Enhancements Cost

Modifications and Enhancements			
Period	Hourly Rate	Hours	Total (Hourly Rate x 30,000 Hours)
Year 1*	\$ 0.00	0	\$ 0.00
Year 2	\$ 114	30,000	\$ 3,420,000
Year 3	\$ 116	30,000	\$ 3,480,000
Year 4	\$ 118	30,000	\$ 3,540,000
Year 5	\$ 121	30,000	\$ 3,630,000
Year 6	\$ 124	30,000	\$ 3,720,000
Year 7	\$ 128	30,000	\$ 3,840,000
Year 8	\$ 132	30,000	\$ 3,960,000
Year 9	\$ 136	30,000	\$ 4,080,000
Year 10	\$ 140	30,000	\$ 4,200,000
All inclusive Maintenance and Operations Cost		GRAND TOTAL	\$ 33,870,000

*For purposes of proposal and evaluation, all vendors should estimate enhancement cost for Year 1 at zero dollars (\$0).

Table 15: All-Inclusive Total Cost

All-Inclusive Total Cost	
Service	Cost
Total DDI Costs (Table 12 Total Cost)	\$ 182,675,000
Total Maintenance and Operations Cost: (Table 13 Grand Total)	\$ 112,330,000
Total Enhancement Cost: (Table 14 Grand Total)	\$ 33,870,000
Grand Total Project Cost	\$ 308,875,000



OptumInsight, Inc.
11000 Optum Circle
Eden Prairie, MN 55344

April 8th, 2024

West Virginia Department of Human Services (WV DoHS)
Office of Management Information Services
1 Davis Square, Suite 200
Charleston, WV 25301
Attn: Mr. Brandon Lewis, Director of Enterprise Systems

RE: # CMA 0511 3084 HHR 1800000007: Statement of Work for WV PATH Family Assistance Summer Electronic Benefits Transfer (S-EBT) Phase 1 of 2

Mr. Lewis:

Optum submits the above referenced Statement of Work (SOW) in accordance with the terms and conditions of the WV IES master contract (# CMA 0511 3084 HHR 1800000007) to perform enhancements outlined within the SOW.

Optum understands and accepts the effective start date of this SOW will be the date in the executed Delivery Order and the effective end date will be through November 16th, 2024, which is the expiration date of the Delivery Order. All work associated with this SOW will be in accordance to the pricing, terms, and conditions of the WV IES master contract.

Sincerely,

W. Mark Youngman
Associate Director of Finance

Agreed

CC: Donna McCormick
Melanie Clark

Optum

West Virginia DoHS

**Statement of Work – WV PATH – Summer Electronic Benefits Transfer (S-EBT)
Phase 1 of 2**



WEST VIRGINIA DEPARTMENT OF

**HUMAN
SERVICES**

Project

DoHS WV IES Project

WV PATH Enhancements

Summer Electronic Benefits Transfer (S-EBT)

WV PATH Integrated Eligibility Enhancement

Phase 1 of 2

Contract Name: WV IES CMA 0511 3084 HHR1800000007

Last Modified Date: 4/8/2024

Version 1.0

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Revision History

This chart contains the history of document revisions. Changes after the final publication of this document require a change request.

Date	Version	Description	Modified By
03/13/2024	1.0	Initial Version	Optum
04/08/2024	2.0	Revised Version – Phase 1 of 2 SOW	Optum

1. Introduction

The following sections in this Statement of Work (SOW) represent the background, scope, and schedule of the enhancements as allowed under the WV Integrated Eligibility System (IES) Project, as well as pricing and an estimated number of hours of work from Optum to perform solely the Phase 1 work described in this SOW, along with a plan for staffing by Optum, and assumptions made by Optum in connection with the Phase 1 work.

The Consolidated Appropriations Act of 2024 was signed into law by President Biden, providing a new summer feeding benefit for eligible school children. Eligible children will receive a one-time \$120 payment in Summer Electronic Benefits Transfer (S-EBT). S-EBT funds can be used in the same manner as Supplemental Nutrition Assistance Program (SNAP) benefits. Benefit periods will be from June 1st – August 20th. WV DoHS and West Virginia Department of Education Child Nutrition (WVDE) will jointly administer and implement West Virginia's S-EBT program.

Eligible populations of children include those who are directly certified based on receipt of a West Virginia Department of Human Services (WV DoHS) program, such as SNAP, Temporary Assistance for Needy Families (TANF)/WV WORKS and Medicaid, and other conditions like being a student in the care of West Virginia Bureau of Social Services (WV BSS), a head-start enrollee, or an unhoused student. The directly certified children who are not enrolled in a National School Lunch Program (NSLP) school and are directly certified are between the ages of 6-17 years old.

At the request of WV DoHS, Optum will make the following modifications to the West Virginia Peoples Access to Help (WV PATH), in two (2) Phases with two (2) separate SOWs:

- In this Phase 1 SOW, Optum will complete the Requirements, Design, Development, Testing for the initial issuance of S-EBT Benefits and also complete the initial issuance of S-EBT benefits. Optum will provide Release Management, Business Analysis and Project Management activities during Phase 1.
- In a separate Phase 2 SOW, Optum will complete additional Testing and include 3 make-up issuances and 3 replacement issuances. Optum will provide Post-Deployment Support during Phase 2, which may include some design and development changes to the batch processing as identified after the initial issuance of S-EBT benefits in the Phase 1 SOW

This SOW addresses solely the work to be done in Phase 1. The approval of the Phase 2 SOW by WV DoHS will be at a future time, yet to be determined. If the Phase 2 SOW is never approved by WV DoHS, WV DoHS will nonetheless be obligated to pay for all work done under this Phase 1 SOW.

As part of this Phase 1 SOW, Optum will make the necessary programmatic changes in West Virginia People's Access to Help (WV PATH) to issue S-EBT benefits to two populations: 1) students that must apply and 2) students who are directly certified. Children who are not directly certified can apply for S-EBT and provide income information to have their eligibility determined. Applicants must be under the income limits for their household (NSLP standards).

At the request of WV DoHS, for the S-EBT program, Optum will complete similar activities that were achieved during the retired Summer Pandemic EBT (P-EBT) program for the Phase 1 work described in this SOW. S-EBT must be made available to most eligible children 7-14 days prior to the start of the summer covered period.

These required changes will be built in WV PATH for an initial issuance of S-EBT benefits, and if a Phase 2 SOW is entered into between Optum and WV DoHS, additional issuances (i.e., makeup and replacement issuances of S-EBT benefits) can be deployed in the Summer of 2024. Any other modifications requested to be made to WV PATH that are not otherwise contemplated in this SOW must be mutually agreed by the parties. Optum will communicate any concerns or risks to WV DoHS in making additional modifications to either budget or schedule.

WV DoHS understands that ongoing support for the development of these requirements may require additional maintenance and support, which would be subject to an additional amendment.

1.1. Acronyms

Acronyms utilized throughout the document are listed below.

Acronym	Definition
BOR	Board of Review
FIS	Fidelity National Information Services
IE	Integrated Eligibility
IE-CC	WV PATH Integrated Eligibility Child Care Release
IE-FA	WV PATH Integrated Eligibility Family Assistance Release
IFM	Investigations and Fraud Management
MIS	Management Information Systems
M&O	Maintenance and Operations of the WV PATH
Northwoods	Software vendor to WV DoHS providing the solution called OnBase/Compass Capture used by WV DoHS for scanning and uploading documents
NSLP	National School Lunch Program
OIG	Office of Inspector General
P-EBT	Pandemic Electronic Benefits Transfer
PMBOK	Project Management Body of Knowledge
PMO	Project Management Office
S-EBT	Summer Electronic Benefits Transfer
SNAP	Supplemental Nutrition Assistance Program
SOW	Statement of Work
TANF	Temporary Assistance for Needy Families
WV BSS	West Virginia Bureau of Social Services
WVDE	West Virginia Department of Education Child Nutrition
WV DoHS	West Virginia Department of Human Services
WV PATH	West Virginia People's Access to Help

1.2. Pricing and Payment

All work activity as outlined in this SOW is on a Time and Material basis and will be billed to WV DoHS starting at \$128.00 per hour in Contract Year 7 (Year 7) (November 17, 2023, until November 16, 2024).

The estimate of hours listed below is based on tasks that will be assigned to Optum resources in the Project Plan. As this is a time and materials arrangement, the specific task assignments may be adjusted as approved by the WV DoHS Project Manager. Optum does not guarantee that all Phase 1 work will be accomplished for the total number of hours set forth below for Phase 1 and WV DoHS will pay Optum for actual hours worked. Any effort required above the total number of hours herein will require a mutually accepted change request, the process being outlined in WV IES Deliverable 021 – Change Management Plan, Section Two: Change Management Approach.

1.3. Invoicing

Invoices for Services provided under this SOW shall be in a form approved by WV DoHS. The Optum invoice will identify the Delivery Order and the Central Master Agreement numbers, the completed task/deliverable, the work hours completed the previous month, reflect the dates of service and the date of completion, and may include supporting documentation to verify that the task/deliverable was completed.

DoHS shall pay Optum for the Services under this SOW, per Section 1.2 above.

2. Scope of Work

The period of performance for this SOW shall commence on the effective date in the Delivery Order ("Effective Date") or as otherwise authorized by the parties and continue for the duration applicable to the Phase 1 work under Section 3.2 (Project Activities).

Optum will make necessary programmatic changes in West Virginia People's Access to Help (WV PATH) to issue S-EBT:

2.1. S-EBT Summary

Optum will support the following requirements, it being understood that any requirements set forth below shall solely relate to Optum's requirements, design, and development work and the testing for the initial issuance of S-EBT benefits as well as the actual initial issuance of S-EBT benefits that comprises the Phase 1 work under this SOW:

1. Benefit Issuance for students who must apply:
 - a. Accept approved spreadsheet(s) of eligible children who completed applications and were determined eligible by West Virginia Department of Education Child Nutrition (WVDE).
 - b. Identify duplicate entries and return to WVDE to determine which entry is to be used.
 - c. Identify entries with errored, or missing data and return to WVDE for correction.
 - d. Issue benefits to only applicants who have a West Virginia residency.
 - e. Send issuance to Fidelity National Information Services (FIS) (EBT vendor) for processing.
 - f. Complete the process for steps a through e for makeup issuance periods.
2. Benefit Issuance for students who are directly certified:
 - a. From WV PATH, children, aged 6 - 17.
 - b. Identify population who are receiving Temporary Assistance for Needy Families (TANF)/SNAP/Medicaid.
 - c. Optum will compile a spreadsheet of eligible direct certified students and prepare for processing. Optum will use a data extract from WV PATH Child Welfare to identify Foster Care children and the necessary demographics.
 - d. Send issuance to FIS for processing.
3. Benefit issuance for students who are now unenrolled and must apply.
 - a. Accept approved spreadsheet(s) of eligible children who completed applications and were determined eligible by West Virginia Department of Education Child Nutrition (WVDE).
 - b. Identify duplicate entries and return to WVDE to determine which entry is to be used.
 - c. Identify entries with errored, or missing data and return to WVDE for correction.
 - d. Issue benefits to only applicants who have a West Virginia residency.
 - e. Send issuance to Fidelity National Information Services (FIS) (EBT vendor) for processing.
4. Summer EBT Autofill Information for Northwoods software company (OnBase Solution):
 - a. Receive file from WVDE containing the demographic details for eligible children, except for the case number, which will be provided after the initial issuance is processed.
 - b. Convert the information in this file to an order and format agreed upon between all parties, including order of fields and also type of file.
 - c. Provide the file via SFTP to Northwoods to include case number.
5. Mass Mailing(s) Issuance:
 - a. Create ADOBE Templates for approved and denied S-EBT letters.
 - b. WV DoHS will provide a file from the external system that provides denial reason codes. Optum will build the logic for the reason codes to appear in the denial letters appropriately.

- c. Prepare letters using the student's name, c/o guardian, complete address as provided by WVDE or with information in the WV PATH Family Assistance (FA) case record.
 - d. Process notices and send to Print Shop.
 - e. Request Print Shop to insert a FH-1 in each approved and denied notice.
 - f. 30 days prior to any 122-day scheduled expungement, send an expungement letter to all cases that fall into this category. The letter template will be provided by SNAP Policy.
 - g. Store all letter records for a minimum period of 3-years, unless stated by Office of Inspector /General (OIG) Investigations and Fraud Management (IFM) / or Board of Review (BOR).
6. Federal and State Reporting:
- a. Provide a report that is equivalent to the FNS-292B each time an S-EBT issuance occurs (initial, make-up or replacement), provided that only the initial issuance of S-EBT benefits and the associated reporting is covered by this Phase 1 SOW. Make-up and replacement issuances of S-EBT benefits and their associated reporting will be set forth in a Phase 2 SOW.
 - b. Provide S-EBT master file(s) after each S-EBT issuance, provide that the S-EBT master file only for the initial issuance of S-EBT benefits shall be provided by Optum under this Phase 1 SOW. Providing the S-EBT master files for the makeup and replacement issuances of S-EBT benefits (as well as such subsequent issuances) shall be covered under the Phase 2 SOW. These reports will be provided to both WV DoHS and WVDE and will be labeled by the type of issuance (initial, makeup or replacement).
7. Estimated Issuance periods:
- a. 1 Initial Benefit Issuance – completed as part of this SOW #1 as agreed upon by WV DoHS and Optum.
 - b. Remaining work on Summer EBT, including the 3 makeup runs and the 3 replacement runs will be addressed in the SOW #2.

2.2. SOW Project Artifacts

Optum will update and provide the following documentation for the phase 1 work described in this SOW to WV DoHS:

- Project Milestones: This document will contain milestones of key tasks and documentation.
- System Design Document: This document will contain a detailed system design for the enhancements and will be broken down by technical components.
- Testing Documentation: Optum will provide documented test results for the initial issuance of S-EBT benefits under this Phase 1 SOW.

2.3. SOW Documentation Approvals

Optum, (or as the case may be regarding a Delivery Order, WV DoHS) will formally submit the following documentation for final review and approval:

- ServiceNow Approval - Documentation around the system changes will be entered into a ServiceNow Change ticket and Optum will create an approval request in the Change Ticket for WV DoHS Leadership to approve implementing the enhancements.
- Delivery Order – WV DoHS will provide Optum formal documentation from the WV DoHS Procurement Office called the Agency Delivery Order (ADO) or the Central Delivery Order (CDO). Either document will initiate the agreement that work can begin on this SOW.
- SOW Acceptance Form - Final submission, which shall be for the completed enhancements that Optum designs and develops to perform the functionality that corresponds to each enhancement identified in Section 2.1 above.

WV DoHS shall review the artifacts and documents, notify Optum of any deficiency(ies), notify Optum when the SOW has been fulfilled, and approve each document identified above in accordance with the time frames for acceptance or rejection set forth in the WV PATH Deliverable D014: Project Schedule.

3. Estimate of Effort

Based on an industry-standard "Waterfall" Systems Development Life Cycle, the estimate of hours for this Statement of Work is shown below and not to exceed unless documented and approved upon in a subsequent change request submitted to WV DoHS by Optum the process being outlined in WV IES Deliverable 021 – Change Management Plan, Section Two: Change Management Approach.

The table below reflects the estimated level of work effort by Optum.

Cost Estimate		
ROLE/ITEM	Year 7 (128) HOURS	TOTALS
Requirements	150	
Design	300	
Development	1600	
Initial Run Testing (for the Initial Issuance of S-EBT Benefits)	500	
Release Management	50	
BA Management	150	
Project Management	50	
TOTALS	2800	\$358,400.00

Work Estimate Based on WV IES Contract Year (runs Nov 17 – Nov 16 per contract year)		
Statement of Work Estimate for Phase 1 work:	Contract Year Hours	Amount
Statement of Work Estimate for Contract Year 7 @ \$128 (04/10/2024 to 11/16/2024)	2800	\$358,400.00
Total Statement of Work Estimate:	2800	\$358,400.00

Work Estimate for Phase 1 Work Based on WV State Fiscal Year (runs July 1 – June 30 per year)		
WV State Fiscal Year:	Est. Work Hours	Amount
WV FY 2024 (04/10/2024 to 06/30/2024)	1400	\$179,200.00
WV FY 2025 (07/01/2024 to 11/16/2024)	1400	\$179,200.00
	2800	\$358,400.00

3.1. Staffing Plan

Below is the staffing plan for this SOW, by role.

Resource Skill	Role on Enhancement	Hours for the Enhancements
Project Manager/Release Manager	SharePoint Management, Project Plan, Manages the Roll Out of Update	100
Business Analyst	Assist with Design/Development	200
DBA	Works on the Tables needing updates in WV PATH and rapids	200
Reporting	Completes Federal and State Reporting requirements	300
Development	Development of batch programs and correspondence creation and including initial run testing	1400
Testing	Testing for the Initial Issuance of S-EBT benefits	600
	Total	2800

3.2. Project Activities – Estimated Duration

The following represents the estimated duration of the activities associated with this SOW for the Phase 1 work. As the Project progresses, estimates may be updated, by mutual agreement of the parties.

The Project schedule will follow a Project Management Book of Knowledge (PMBOK recommended “rolling wave” project planning process, i.e., as each phase of the Project occurs, additional details will be added to the Project Plan.

Project Activities are not necessarily sequential; the start date for a given Project Activity will not be dependent in part upon the completion of a preceding Project Activity.

Project Activity for Phase 1 Work	Activity Duration
Requirements Definition and Design Phase	2 weeks
Development Phase	6 weeks
Testing of Initial Issuance of S-EBT Benefits	1 week
Initial Issuance of S-EBT Benefits	2 days

4. Project Assumptions

Below are the assumptions for this Project:

- The Phase 1 Work commences under this SOW upon execution of the Delivery Order by WV DoHS or an otherwise authorization to proceed letter issued by WV DoHS.
- Optum and WV DoHS will share details on a bi-weekly/monthly basis of project hours worked for this SOW, so that the overall pool of hours can be jointly managed.
- The rates proposed for CY 7 are valid through November 16, 2024.
- For any work needed beyond November 16, 2024, the CMA would need to be extended to exercise Contract Year 8.
- Estimated timelines assume that the authorized representatives from the West Virginia Office of Technology, and the MIS Staff respond to Optum requests and provide necessary input and/or approvals in a timely manner so Optum may continue to meet the requirements and timeframes identified herein.
- WV DoHS will provide Optum with as much notice as possible regarding potential delays in work progress within the project plan.
- Optum will not be held responsible for missed deadlines held up by the completion of State-owned tasks or tasks with dependencies on State-owned tasks as documented in the project plan. Any such delay may prevent issuance of S-EBT as required.
- Maintenance and Operations (M&O) impacts related to this SOW are not fully known and may require additional support and funding.
- If any of this work is not able to be fully absorbed with the current schedule for upcoming WV PATH Go Lives, either due to not enough enhancement hours or due to current schedule, there will be impacts or there will need to be a prioritization of what enhancements can be completed for WV PATH IE-CC or IE-FA Go Lives.

5. Project Roles and Responsibilities

5.1. DoHS Roles and Responsibilities

WV DoHS roles and responsibilities are described below:

- Approve and execute the Delivery Order and the SOW prior to work commencing.
- Approve the software requirements specifications and provide the Business Requirement Document.
- Review and approve all Project Documents, including the Business Requirement Document in a timely manner.
- Ensure Optum is provided with a single resource as a Project lead and that Optum is provided with reasonable timely assistance to enable Optum to meet the requirements and timeframes identified herein.

5.2. Optum Roles and Responsibilities

The Optum team and their roles and responsibilities are described below:

- Provide expertise on system design, project management, code development, testing and deployment of the initial issuance of S-EBT benefits.
- Oversee assigned resources.
- Designate a single Optum resource as the Project lead and as the single point of contact for the West Virginia Project Manager.
- Provide Documentation as defined in Section 2 of this SOW.

6. Statement of Work Acceptance

In consideration of the promises and mutual obligations contained herein, WV DoHS hereby confirms agreement with the provisions set forth in this SOW and approves commencement of the Project.



Signed for and on behalf of
**The State of West Virginia, Department of
Human Services, by:
Brandon Lewis**

By:

Name: Brandon Lewis

Title: Director, Office of Enterprise Systems
WV DoHS Bureau of Medical Services

Date: 4/9/2024



Signed for and on behalf of
**OptumInsight, Inc., by:
W. Mark Youngman**

By:

Name: W. Mark Youngman

Title: Associate Director of Finance

Date: April 8, 2024

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OPTUMINSIGHT, INC.

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
C Corporation	12/2/1998		12/2/1998	Foreign	Profit			

Organization Information			
Business Purpose	6214 - Health Care and Social Assistance - Ambulatory Health Care Services - Outpatient Care Centers (family planning, mental health, substance abuse, HMO, kidney dialysis, freestanding ambulatory surgical & emergency centers)		Capital Stock 0.0000
Charter County			Control Number 0
Charter State	DE	Excess Acres 0	
At Will Term	Member Managed		
At Will Term Years			Par Value 0.000000
Authorized Shares	0	Young Entrepreneur	Not Specified

Addresses	
Type	Address
Mailing Address	11000 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344 USA
Notice of Process Address	C T CORPORATION SYSTEM 5098 WASHINGTON ST W STE 407 CHARLESTON, WV, 253131561
Principal Office Address	11000 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344 USA
Type	Address

Officers	
Type	Name/Address
Director	NEIL EDMUND DE CRESCENZO 100 AIRPARK CENTER EAST NASHVILLE, TN, 37217
President	NEIL EDMUND DE CRESCENZO 100 AIRPARK CENTER EAST NASHVILLE, TN, 37217
Secretary	ELIZABETH ANN SODERBERG 11000 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344
Treasurer	PETER MARSHALL GILL 9900 BREN ROAD EAST MINNETONKA, MN, 55343
Type	Name/Address

DBA			
DBA Name	Description	Effective Date	Termination Date
INGENIX	TRADENAME	1/4/2012	5/11/2022
DBA Name	Description	Effective Date	Termination

Name Changes	
Date	Old Name
1/4/2012	INGENIX, INC.
Date	Old Name

Mergers				
Merger Date	Merged	Merged State	Survived	Survived State
7/21/2008	GEOACCESS, INC.	KS	INGENIX, INC.	DE
7/21/2008	HWT, INC.	DE	INGENIX, INC.	DE
1/23/2009	INGENIX HEALTH INTELLIGENCE, INC.	DE	INGENIX, INC.	DE
4/8/2010	J.W. HUTTON, INC.	IA	INGENIX, INC.	DE
5/10/2010	INGENIX MERGERCO, INC.	DE	INGENIX, INC.	DE
6/3/2010	GLOBAL WORKS SYSTEMS, INC.	CA	INGENIX, INC.	DE
Merger Date	Merged	Merged State	Survived	Survived State

Date	Amendment
1/4/2012	NAME CHANGE: FROM INGENIX, INC.
6/3/2010	MERGER: MERGING GLOBAL WORKS SYSTEMS, INC., A QUALIFIED CA CORPORATION WITH AND INTO INGENIX, INC., A QUALIFIED DE CORPORATION, THE SURVIVOR
5/10/2010	MERGER: MERGING INGENIX MERGERCO, INC., A QUALIFIED DE CORPORATION WITH AND INTO INGENIX, INC., A QUALIFIED DE CORPORATION, THE SURVIVOR
4/8/2010	MERGER: MERGING J.W. HUTTON, INC., A NON-QUALIFIED IA ORGANIZATION WITH AND INTO INGENIX, INC., A QUALIFIED DE CORPORATION, THE SURVIVOR
1/23/2009	MERGER: MERGING INGENIX HEALTH INTELLIGENCE, INC., A NON-QUALIFIED DE ORGANIZATION WITH AND INTO INGENIX, INC., A QUALIFIED DE CORPORATION, THE SURVIVOR
7/21/2008	MERGER: MERGING GEOACCESS, INC., A NON-QUALIFIED KS ORGANIZATION WITH AND INTO INGENIX, INC., A QUALIFIED DE CORPORATION, THE SURVIVOR
7/21/2008	MERGER: MERGING HWT, INC., A QUALIFIED DE CORPORATION WITH AND INTO INGENIX, INC., A QUALIFIED DE CORPORATION, THE SURVIVOR

Date	Amendment
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For more information, please contact the Secretary of State's Office at 304-558-8000.

Tuesday, April 9, 2024 — 10:42 AM

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