



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: 10-29-2024

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 3899 MIS2500000004 1                        | Procurement Folder:      | 1533403                  |
| Document Name:        | IE-FA QMB and Bendex                                 | Reason for Modification: |                          |
| Document Description: | Monthly Process of approving QMB for MSS recipients. |                          |                          |
| 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<br>OPTUMINSIGHT INC<br>11000 OPTUM CIR<br><br>EDEN PRAIRIE MN 55344<br>US<br>Vendor Contact Phone: 612-642-7749 Extension:<br><br>Discount Details:<br><table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table> |                    | Discount Allowed    | Discount Percentage | Discount Days | #1 | No | 0.0000 | 0 | #2 | No |  |  | #3 | No |  |  | #4 | No |  |  | Requestor Name: Kimberly A Beckett<br>Requestor Phone: (304) 558-5906<br>Requestor Email: kimberly.a.beckett@wv.gov<br><br><b>2025</b><br>FILE LOCATION _____ |
|   | Discount Allowed   | Discount Percentage | Discount Days       |               |    |    |        |   |    |    |  |  |    |    |  |  |    |    |  |  |   |
| #1  | No                 | 0.0000              | 0                   |               |    |    |        |   |    |    |  |  |    |    |  |  |    |    |  |  |   |
| #2  | No                 |                     |                     |               |    |    |        |   |    |    |  |  |    |    |  |  |    |    |  |  |   |
| #3  | No                 |                     |                     |               |    |    |        |   |    |    |  |  |    |    |  |  |    |    |  |  |   |
| #4  | No                 |                     |                     |               |    |    |        |   |    |    |  |  |    |    |  |  |    |    |  |  |   |

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

Purchasing Division's File Copy

Total Order Amount: \$678,400.00

PURCHASING DIVISION AUTHORIZATION

DATE: *11/7/24*  
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: *11-8-24*  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

IE-FA QMB and Bendex OPTUM will make changes to the monthly process of approving QMB for MSS recipients found to be eligible as listed in section 2.1.

| Line         | Commodity Code | Quantity     | Unit | Unit Price | Total Price   |
|--------------|----------------|--------------|------|------------|---------------|
| 1            | 81111511       | 0.00000      |      | \$0.0000   | \$678,400.00  |
| Service From | Service To     | Manufacturer |      | Model No   | Delivery Date |
| 2024-10-01   | 2024-11-16     |              |      |            | 2024-10-21    |

**Commodity Line Description:** Modifications and Enhancements Year 7 Hourly Rate

**Extended Description:**

IE-FA QMB and Bendex for a total of 5300 hours.

Change Order No. 12 To transfer 14,707 hours at \$128.00 per hour bringing the total hours for Year 7 to 46,907 hours at \$128.00 per hour for a total of \$6,004,096.

Change Order No. 11 To transfer 2,200 unused Modification and Enhancement Hours to Year 7. Modification and Enhancements Year 7 32,200 hours at \$128.00 per hours.

Modifications and Enhancements Year 7 Hourly Rate 30,000 hours at \$128.00 per hour



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

October 3, 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 QMB Bendex**

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 16<sup>th</sup>, 2024, which is the expiration date of the Delivery Order. All work associated with this SOW will be in accordance with the pricing, terms, and conditions of the WV IES master contract.

Sincerely,

A handwritten signature in blue ink, appearing to read "W. Mark Youngman", followed by a large, stylized circular flourish.

W. Mark Youngman

Associate Director of Finance

CC: Donna McCormick  
Melanie Clark



West Virginia DoHS

Statement of Work 10 – Integrated Eligibility – Family Assistance  
WV PATH QMB Change for Bendex



WEST VIRGINIA DEPARTMENT OF

**HUMAN  
SERVICES**

**Project**

DoHS WV IES Project

**WV PATH Enhancements**

IE-FA QMB and Bendex

WV PATH Integrated Eligibility Enhancement

**Contract Name:** WV IES CMA 0511 3084 HHR1800000007

Last Modified Date: 10/3/2024

Version 1.0

Table of Contents

Revision History ..... 2

1. Introduction..... 3

1.1. Acronyms ..... 4

1.2. Pricing and Payment ..... 4

1.3. Invoicing ..... 4

2. Scope of Work..... 5

2.1. QMB for Bendex Summary ..... 5

2.2. SOW Project Artifacts ..... 5

2.3. SOW Documentation Approvals ..... 6

3. Estimate of Effort..... 7

3.1. Staffing Plan ..... 8

3.2. Project Activities – Estimated Duration ..... 8

4. Project Assumptions ..... 9

5. Project Roles and Responsibilities..... 10

5.1. DoHS Roles and Responsibilities ..... 10

5.2. Optum Roles and Responsibilities ..... 10

6. Statement of Work Acceptance..... 11

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 |
|------------|---------|-----------------|-------------|
| 08/05/2024 | 1.0     | Initial Version | 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 high-level pricing and work estimate by Optum, a plan for staffing by Optum, and assumptions made by Optum in connection with the work.

Due to new federal regulations finalized in the Final Rule, Streamlining Medicaid; Medicare Savings Program Eligibility Determination and Enrollment (published September 21, 2023), and codified at 42 CFR 435.909(b). New rules require states to deem individuals as eligible for the Qualified Medicare Beneficiary (QMB) group, without requiring an application, if they are determined eligible for Supplemental Security Income (SSI) based Medicaid and entitled to Medicare Part A or enrolled in Medicare Part B. WV Department of Human Services (WV DoHS) has requested Optum make changes in the West Virginia People's Access to Help (WV PATH) to comply with these changes.

This SOW documents the required changes Optum will make in WV PATH to the Integrated Eligibility-Family Assistance (IE-FA) release to support this change, commonly referred to as "QM Bendex". Optum will make changes to the monthly process of approving QMB for MSS recipients found to be eligible as listed in section 2.1.

Any significant delays in the approval of this Statement of Work that prevents the start of Optum's work may delay the delivery date.

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 in writing. 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   |
|---------|--|
| BENDEX  | Beneficiary and Earnings Data Exchange                   |
| IE-FA   | WV PATH Integrated Eligibility Family Assistance Release |
| MIS     | Management Information Systems                           |
| M&O     | Maintenance and Operations of the WV PATH                |
| PMBOK   | Project Management Body of Knowledge                     |
| PMO     | Project Management Office                                |
| QC      | Quality Controls   |
| QMB     | Qualified Medicare Beneficiaries                         |
| SOW     | Statement of Work  |
| TBQ     | Territories & States Beneficiary Query                   |
| 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. The effort required above the totals 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 under Section 3.2 (Project Activities).

### 2.1. QMB for Bendex Summary

For WV PATH IE-FA, (QMB for Bendex) changes are required by federal regulation. Optum will make the following changes for the monthly process of approving QMB for any MSS recipients found to be eligible.

| #   | Tasks  | No. of Hours |
|-----|--|--------------|
| 1.0 | Receive Buy-in and Territories & States Beneficiary Query (TBQ) file from Gainwell Technologies (GWT) and process them to identify Pins who are open in MSS and create new Medicare screen and add trigger for creating QMB for them | 1100         |
| 1.1 | Create SFU for QMB based on triggers in previous step  | 600          |
| 1.2 | Create Elig and confirmation for QMB   | 1500         |
| 1.3 | No review date to be set for QMB as long as MSS is open  | 500          |
| 1.4 | If MSS closes review date will be set for QMB at confirmation.   | 500          |
| 2.0 | Phase 1 - Eligibility/SFU rules will be changed to allow QMB and MSS to co-exist at the same time if they have Medicare screen.  | 600          |
| 3.0 | Phase 2 –Batches to be changed to send the MREV notice on second Friday and push to client portal  | 500          |
|     |  | 5300         |

### 2.2. SOW Project Artifacts

Optum will update and provide the following documentation inclusive of modifications 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.
- **Test Plan/Results Document:** This document will highlight the areas and types of testing that will be performed. It will also be composed of test scenarios and expected outcomes. Optum will use existing test scenarios. In addition, this document will provide a detailed outcome of all the test scenarios that were executed in the various phases of testing.



### **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, develops, tests, and deploys 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.

### 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.

These changes will require Design, Development, Testing and Implementation and include Documentation and Training, where applicable, and the table reflects the estimated level of work effort by Optum.

| Cost Estimate                                      |                       |                     |
|--|-----------------------|---------------------|
| ROLE/ITEM  | Year 7 (128)<br>HOURS | TOTALS              |
| Requirements                                       | 200                   |                     |
| Design   | 500                   |                     |
| Development  | 2000                  |                     |
| Testing  | 1900                  |                     |
| Ancillary Support (Documentation/Training/Release) | 200                   |                     |
| Project Management                                 | 500                   |                     |
| <b>TOTALS</b>                                      | <b>5300</b>           |                     |
|  |                       | <b>\$678,400.00</b> |

| Work Estimate Based on WV IES Contract Year (runs Nov 17 – Nov 16 per contract year)    |                     |                     |
|---|---------------------|---------------------|
| Statement of Work Estimate:   | Contract Year Hours | Amount              |
| Statement of Work Estimate for Contract Year 7<br>@ \$128<br>(10/01/2024 to 11/16/2024) | 5300                | \$678,400.00        |
| <b>Total Statement of Work Estimate:</b>  | <b>5300</b>         | <b>\$678,400.00</b> |

| Work Estimate Based on WV State Fiscal Year (runs July 1 – June 30 per year) |                 |                     |
|--|-----------------|---------------------|
| WV State Fiscal Year:  | Est. Work Hours | Amount              |
| WV FY 2025 (07/01/2024 to 11/16/2024)  | 5300            | \$678,400.00        |
|  | <b>5300</b>     | <b>\$678,400.00</b> |

### 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     | 700                        |
| Business Analyst                | Assist with Design/Development  | 200                        |
| Development                     | Significant work on Design Validation and Development; Solution Testing | 2500                       |
| QA/Testing                      | System Integrated Testing   | 1900                       |
|                                 | <b>Total</b>  | <b>5300</b>                |

### 3.2. Project Activities – Estimated Duration

The following represents the estimated duration of the activities associated with this SOW. 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                         | Activity Duration |
|--|-------------------|
| Requirements Definition and Design Phase | 2 weeks           |
| Development Phase                        | 12 weeks          |
| SIT                                      | 4 weeks           |
| UAT                                      | 2 weeks           |
| Deploy to Production                     | 1 week            |

## 4. Project Assumptions

Below are the assumptions for this Project:

- 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.
- WV DoHS will provide user acceptance testing personnel and scenarios to execute User Acceptance Testing in accordance with the estimated timeline in Section 3.2.
- 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.
- 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.
- Prepare User Acceptance Test plan/scenarios.
- Execute User Acceptance Testing.
- Approve applicable Deliverable(s) for this SOW prior to production deployment.
- 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.
- 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: 10/7/2024



Signed for and on behalf of  
**The State of West Virginia, Department of  
Human Services**, by:  
**Cynthia A. Persily Ph.D.**

By:

Name: Cynthia A. Persily, Ph.D.

Title: Cabinet Secretary, West Virginia Department of  
Human Services

Date:



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

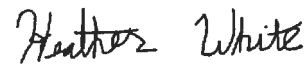
By:

Name: W. Mark Youngman

Title: Associate Director of Finance

Date: October 3, 2024

Agreed



# 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 | <p>Optum will take over existing computing costs, as necessary, through modernization. We assumed the current West Virginia mainframe chargeback is:</p> <ul style="list-style-type: none"> <li>• \$70k/month for Mainframe Batch Cost</li> <li>• \$143k/month for Mainframe Online Cost</li> </ul> <p>These costs are reflected as part of the modernization effort.</p>  |
| 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          |
| <b>Total DDI Costs</b><br>(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<br>(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                       |
| <b>All Inclusive Maintenance and Operations Cost</b> | <b>GRAND TOTAL</b> | <b>\$ 112,330,000</b>               |

\*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<br>(Table 12 Total Cost)                         | \$ 162,675,000 |
| Total Maintenance and Operations Cost:<br>(Table 13 Grand Total) | \$ 112,330,000 |
| Total Enhancement Cost:<br>(Table 14 Grand Total)                | \$ 33,870,000  |
| Grand Total Project Cost   | \$ 308,875,000 |



**Sherri A. Young, D.O.,  
MBA, FAAFP  
DH Cabinet Secretary**



**West Virginia  
DEPARTMENT OF  
Health Facilities**

**Michael J. Caruso  
DHF Cabinet Secretary**



**WEST VIRGINIA DEPARTMENT OF  
HUMAN  
SERVICES**

**Cynthia A. Persily, Ph.D.  
DoHS Cabinet Secretary**

**STATE OF WEST VIRGINIA  
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES**

**Office of Management Information Services | Shaun Charles, Chief Information Officer**

**Date:** October 7, 2024

**To:** Office of Shared Administration  
Purchasing Department

**From:** Kimberly Beckett, Procurement Associate *KB*  
Management Information Services

**Re:** WV PATH Family Assistance QMB Bendex

The Office of Management Information Service and OPTUMINSIGHT are requesting approval for the Statement of Work for the WV PATH Family Assistance QMB and Bendex With the service dates of 10/1/24 to 11/16/2024. Your approval is greatly appreciated.





Sherri A. Young, D.O.,  
MBA, FAAFP  
DH Cabinet Secretary



West Virginia  
DEPARTMENT OF  
Health Facilities

Michael J. Caruso  
DHF Cabinet Secretary



WEST VIRGINIA DEPARTMENT OF  
**HUMAN  
SERVICES**

Cynthia A. Persily, Ph.D.  
DoHS Cabinet Secretary

STATE OF WEST VIRGINIA  
DEPARTMENTS OF HEALTH, HEALTH FACILITIES, AND HUMAN SERVICES

Office of Management Information Services | Shaun Charles, Chief Information Officer

Date: October 22, 2024

To: Purchasing Division  
Office of Shared Administration

From: Kimberly Beckett, Procurement Associate *KB*  
Management Information Services

Re: IE-FA QMB & Bendex  
CDO MIS25\*04

This memo is to provide justification to explain the reason for a late submission. Everything was ready to be submitted at the beginning of the month. However, it was held up due to the fact that the funding got pulled and needed to be reallocated.

*Back date  
app  
TB*



## Keyword Search

For more information on how to use our keyword search, visit our help guide

### Simple Search

### Search Editor

- ☐ Any Words <sup>i</sup>
- ☐ All Words <sup>i</sup>
- ☐ Exact Phrase <sup>i</sup>

e.g. 123456789, Smith Corp

"OPTUMINSIGHT INC"

x

Entity

Location

Status



Active



Inactive

Reset 



## No matches found

Your search did not return any results for active records.

Would you like to include inactive records in your search results?

Search inactive

Go back

You are viewing this page over a secure connection. Click [here](#) for more information.

## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

*NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.*

#### OPTUMINSIGHT, INC.

*\*See Attached\**

| 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  |  |                     |                         |
|---------------------------|--|---------------------|-------------------------|
| <b>Business Purpose</b>   | 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) |                     |                         |
| <b>Capital Stock</b>      | 0.0000   |                     |                         |
| <b>Charter County</b>     |  |                     | <b>Control Number</b> 0 |
| <b>Charter State</b>      | DE   | <b>Excess Acres</b> | 0                       |
| <b>At Will Term</b>       |  |                     |                         |
| <b>At Will Term Years</b> |  |                     |                         |
| <b>Authorized Shares</b>  | 0  | <b>Entrepreneur</b> | Not Specified           |



## Addresses

| Type                             | Address   |
|----------------------------------|---|
| <b>Mailing Address</b>           | 1 OPTUM CIRCLE<br>EDEN PRAIRIE, MN, 55344   |
| <b>Notice of Process Address</b> | C T CORPORATION SYSTEM<br>5098 WASHINGTON ST W STE 407<br>CHARLESTON, WV, 253131561 |
| <b>Principal Office Address</b>  | 1 OPTUM CIRCLE<br>EDEN PRAIRIE, MN, 55344   |
| Type                             | Address   |

## Officers

| Type             | Name/Address   |
|------------------|--|
| <b>Director</b>  | ROGER GERARD CONNOR<br>1 OPTUM CIRCLE<br>EDEN PRAIRIE, MN, 55344     |
| <b>President</b> | ROGER GERARD CONNOR<br>1 OPTUM CIRCLE<br>EDEN PRAIRIE, MN, 55344     |
| <b>Secretary</b> | ELIZABETH ANN SODERBERG<br>1 OPTUM CIRCLE<br>EDEN PRAIRIE, MN, 55344 |
| <b>Treasurer</b> | MARILYN VICTORIA HIRSCH<br>1 OPTUM CIRCLE<br>EDEN PRAIRIE, MN, 55344 |
| 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 Date |

## Name Changes

| Date     | Old Name      |
|----------|---------------|
| 1/4/2012 | INGENIX, INC. |
| Date     | Old Name      |

Hi, I'm SOLO! I can help you file your Annual Report.

## Mergers

| Merger Date | Merged                            | Merged State | Survived      | Survived Sta.  |
|-------------|-----------------------------------|--------------|---------------|----------------|
| 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   |

## Annual Reports

### Filed For

2024

2023

2022

Hi, I'm SOLO! I can help you file your Annual Report.

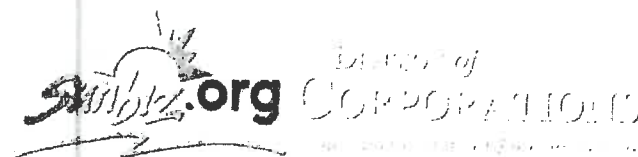
|                   |
|-------------------|
| 2021              |
| 2020              |
| 2019              |
| 2018              |
| 2017x             |
| 2017              |
| 2016              |
| 2015              |
| 2014              |
| 2013              |
| 2012              |
| 2011              |
| 2010              |
| 2009              |
| 2008              |
| 2007              |
| 2006              |
| 2005              |
| 2004              |
| 2003              |
| 2002              |
| 2001              |
| 2000              |
| 1999              |
| <b>Date filed</b> |

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

Thursday, November 7, 2024 — 9:54 AM

© 2024 State of West Virginia

Hi, I'm SOLO! I can help  
you file your Annual  
Report.



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

## Detail by Entity Name

Foreign Profit Corporation

OPTUMINSIGHT, INC.

### Filing Information

**Document Number** F97000000189

**FEI/EIN Number** 41-1858498

**Date Filed** 01/10/1997

**State** DE

**Status** ACTIVE

**Last Event** AMENDMENT

**Event Date Filed** 11/22/2022

**Event Effective Date** NONE

### Principal Address

1 Optum Circle  
Eden Prairie, MN 55344

Changed: 10/09/2024

### Mailing Address

1 Optum Circle  
Eden Prairie, MN 55344

Changed: 10/09/2024

### Registered Agent Name & Address

C T CORPORATION SYSTEM  
1200 SOUTH PINE ISLAND ROAD  
PLANTATION, FL 33324

### Officer/Director Detail

#### **Name & Address**

Title Director

Shumacher M.D, Ronald Joel  
11000 Optum Circle  
Eden Prairie, MN 55344

Title Assistant Secretary