



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: 09-08-2025

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 MIS2500000006 6	Change Order No:	2	Procurement Folder:	1573015
Document Name:	WV PATH CW Bank Vendor Change			Reason for Modification:	CO-2-To increase the cost of contract.
Document Description:	CO-2-Switching of bank vendors.				
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 6
Free on Board:	FOB Dest, Freight Prepaid				

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000184667 OPTUMINSIGHT INC 11000 OPTUM CIR EDEN PRAIRIE MN 55344 US Vendor Contact Phone: 612-642-7749 Extension: Discount Details: <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 Requestor Phone: (304) 558-5854 Requestor Email: kimberly.a.beckett@wv.gov 2026 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 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: \$468,600.00

Purchasing Division's File Copy

CH 9/17/25
PURCHASING DIVISION AUTHORIZATION

DATE: 9/17/25
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: 9-18-25
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Change Order No. 2 is issued to add additional hours and money on the original contract according to all terms, conditions, and specifications contained in the original contract and all authorized change orders, except that the contract amount will increase by \$169,620.00 as defined in the attached documentation.

Original Contract Total: \$298,980.00
Change Order No. 2 Increase: \$169,620.00

New Contract Total: \$468,600.00

No other changes.

All provision of the original Contract and subsequent Change Orders not modified herein shall remain in full force and effect.

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	81111511	0.00000		\$0.0000	\$468,600.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-11-17	2025-11-16			2025-06-23	

Commodity Line Description: Modifications and Enhancements Year 8 Hourly Rate

Extended Description:

Modifications and Enhancements Year 8 Hourly Rate 30,000 hours at \$132.00 per hour



West Virginia DoHS

First Amendment to Statement of Work 11 WV PATH Child Welfare
Bank Vendor Change



WEST VIRGINIA DEPARTMENT OF

**HUMAN
SERVICES**

Project

West Virginia DoHS IES Project

WV PATH Enhancements

IE-CW Bank Vendor Change

WV PATH Integrated Eligibility Enhancement

Contract Name: WV IES CMA 0511 3084 HHR1800000007

Last Modified Date: 07/07/2025

Version 1.1

This is the first amendment (First Amendment) to Statement of Work 11 WV PATH Child Welfare Bank Vendor Change ("SOW"). This First Amendment to the current SOW is required to address the items discovered (as listed below) during the course of the initial work performed under this SOW:

1. Late definition on file format. The new bank vendor, Truist, has been unable to provide a documented format for the new bank vendor file. As of 6/17/2025, Optum has received draft test files, but has not received an approved interface specification document sufficient to allow development to begin
2. Delayed confirmation of Truist ability to replicate the data that is currently being sent to CW PATH from current bank vendor JP Morgan. Truist required that they see Federal transactions in their Production environment first prior to committing to their ability to replicate the contents of the current JP Morgan file.
3. Change of development lifecycle approach. To accommodate the Truist need to receive production transactions from Social Security Administration (SSA), the project approach was modified to incorporate a pilot phase for Marion County. This new pilot phase allowed Truist to see production transactions and take steps to confirm file format and content.
4. Change in UAT and deployment approach to recognize the new pilot phase in operation.
5. Change of inbound interface business rules to exclude debit transactions. These were previously excluded under the JP Morgan process but are not excluded by Truist.
6. Change of inbound interface business rules to exclude transactions from the defined retro account. These were previously excluded under the JP Morgan process but are not excluded by Truist.
7. Manual entry of Marion County transactions. With the new development approach, it is incumbent upon State personnel to manually key Marion County transactions into PATH. This began in May 2025 and will continue until the project go-live. Although the primary additional effort for this change in approach lies with the State, Optum support is required to support and validate manually entered transactions.
8. Parallel running of JP Morgan and Truist business processes. It will now be necessary to operate the current JP Morgan and Truist interfaces concurrently until full deployment of the Truist interface *and* confirmation that no further transactions will be deposited into JP Morgan.

This First Amendment will amend the SOW in the following provisions to add additional scope of work, add additional hours and dollars, update duration and define additional roles and responsibilities, at the request of WV DoHS, to implement the change in bank vendor for CW.

2.0 Scope of Work

2.1 CW Bank Vendor Change

3.0 Estimate of Effort

3.1 Staffing Plan

3.2 Project Activities-Estimated Duration

4.0 Project Assumptions

All other terms not amended herein remain in effect as part of the SOW

#1. Section 2.0 Scope of Work.

Section 2.0 Scope of Work is modified to include the period of performance for the First Amendment as well as a high-level description:

"The period of performance for this First Amendment shall commence on the effective date in the Delivery Order ("Effective Date") or as otherwise authorized and continue under Section 3.2 (Project Activities).

Optum will perform the additional work of implementing a pilot program to accommodate the need for the new bank vendor, Truist, to view production transactions from the Social Security Administration and confirm file format and content."

Section 2.1 CW Bank Vendor Change. This section is being amended to add the following descriptions of new work (in italics) to the existing table in Section 2.1:

2.1 CW Bank Vendor Change

Batches	<ul style="list-style-type: none"> • <i>Add batch functionality to exclude debit transactions</i> • <i>Add batch functionality to exclude retro account transactions</i> • <i>Support State operations in manual entry of Marion County transactions in the initial pilot phase</i> • <i>Liaise with Truist as they evolve their file format in response to the Marion County pilot phase</i> • <i>Expand batch processing to support parallel operations of JP Morgan and Truist interfaces.</i>
Reports	<ul style="list-style-type: none"> • <i>Modify client account transaction (report(s)) to identify which bank transactions originated from.</i>
Testing	<ul style="list-style-type: none"> • <i>Expand the Marion County pilot to include any non-county specific transactions and use this expanded pilot as input to SIT and UAT testing. This will require a reworked testing strategy and test cases.</i> • <i>Conduct post go-live support to ensure</i>

	<i>effective processing of Truist transactions, manage the parallel running of JP Morgan transactions, and retire the JP Morgan interface once Truist Production operations have stabilized.</i>
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#2. Section 3.0 Estimate of Effort: This section is being amended to add additional hours and dollars to the original figures in the cost estimate table and extend the dates for the work estimate. Under this First Amendment additional hours will be required to deliver the intended scope based on the changed project circumstances and modified implementation approach. Work estimates for Contract Year 8 and for WV FY will be extended to November 16, 2025. As such, this First Amendment deletes the existing tables in Section 3 and replaces as follows:

			Cost Estimate
ROLE/ITEM	Year8 (132) HOURS	Additional Hours Under First Amendment	First Amendment TOTALS
Design/Development	1035	880	1915
Testing/Defect Fixes	910	235	1145
Release Management	40	50	90
Project Management	100	80	180
Documentation Deliverables	180	40	220
TOTALS	2265	1285	3550
			\$468,600.00

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 8 @ \$132 (11/17/2024 to 11/16/2025)	2265	\$298,980.00
Additional LoE Estimate for First Amendment	1285	\$169,620.00
Total Statement of Work Inc First Amendment Estimate:	3550	\$468,600.00

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 (012/01/2024 to 06/30/2025)	2265	\$298,980.00
Additional LoE Estimate for First Amendment WV FY2026 (07/01/2025 to 11/16/2025)	1285	\$169,620.00

#3 3.1 Staffing Plan Changes:

This Section 3.1 is being amended to reflect additional staff hours for the amended scope of work. As such, this First Amendment deletes the existing table in Section 3.1 and replaces as follows:

Resource Skill	Role on Enhancement	Hours for the Enhancements	Additional Hours included in First Amendment
Project Manager/Release Manager	SharePoint Management, Project Plan, Manages the Roll Out of Update	140	130
Development	Significant work on Design Validation and Development; Solution Testing	1035	880
QA/Testing	System Integrated Testing	910	235
Documentation Deliverables	Documentation Updates	180	40
	Total	2265	1285

#4. Section 3.2 Project Activities-Estimated Duration. Duration of work will be extended in alignment with the extension of Work Estimates for CY 8. As such, this First Amendment deletes the existing table in Section 3.2 and replaces as follows:

3.2 Project Activities – Estimated Duration

Project Activity	Original Duration	Activity	Revised Duration Based on First Amendment
Requirements Definition and Design Phase	2 weeks		20 weeks
Development Phase	10 weeks		10 weeks
SIT	2 weeks		2 weeks
UAT	2 weeks		2 weeks
Deploy to Production	1 week		2 weeks

#5. Section 4 Project Assumptions. This section is being amended to add additional project assumptions as set forth in italics below.:

- *Optum will continue to bill work against the existing delivery order for this SOW. If hours on that delivery order are exhausted prior to this First Amendment being executed Optum will pause all work until the First Amendment is executed, and the delivery order is updated.*
- *Optum assumes that this First Amendment will be approved for chargeable work no later than 08/15/2025. If this date is not achieved, then Optum will pause all work tied to the SOW and the planned go live scheduled and LoE will be recalculated.*
- *Optum will draft an interface design deliverable and assumes complete DoHS review of that deliverable prior to 08/08/2025. This deadline will allow Optum to begin development in time to meet an November, 2025 go-live date. The draft deliverable will be based upon the Truist test files provided to Optum by 07/03/2025. Late approval of the design deliverable will cause go live to be delayed and may trigger an additional amendment to the LoE.*
- *The FDS provided by Optum for review and approval will necessarily contain some elements that are subject to change due to the revised Marion County-based pilot approach to development. Optum will make best efforts to accurately document the FDS for State review and will notate the submitted deliverable in areas that Optum believes are the most likely to change as a result of the pilot.*
- *State will work with Truist to provide a stable interface specification document no later than 08/08/2025..*
- *Optum will conduct SIT in the PATH Child Welfare Perf environment using production data from the Marion County pilot*
- *State will conduct UAT based upon live data in the Perf environment from the Marion County pilot. Optum will provide extracts from the Perf environment that will allow the State to cross walk PATH consumed transactions against the transactions shown to the State in the Truist online account access. The duration of this test will be five business days.*
- *Truist modifies its online account access functionality to display all incoming transaction data to State users. If this does not occur, then UAT cannot begin.*
- *Truist accepts that the transmission of the Marion County interface file does not constitute final acceptance of the transmitted file for Production purposes. Defects found during the SIT, UAT and post production monitoring phases will require*

correction to file layout and data definition. If a defect resides within Truist file creation functionality then Truist will resolve that defect within a timeframe that does not disrupt the project schedule.

- *DoHS will continue to closely monitor and cross walk transactions between Truist online application and PATH Child Welfare application for a minimum period of two weeks post Production deployment.*

#6. First Amendment to Statement of Work Acceptance

In consideration of the promises and mutual obligations contained herein, DoHS hereby confirms agreement with the provisions set forth in this First Amendment to SOW 11 and approves commencement of the additional scope, duration, and costs. All other terms of the SOW not modified herein remain in force and in effect.



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

By:

Name: Brandon Lewis

Title: Chief of Technology and Information
Systems
Office of Cabinet Secretary

Date: August 1, 2025



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

By:

Name: Mark Yougman

Title: Associate Director of Finance

Date: August 1, 2025

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"> • \$70k/month for Mainframe Batch Cost • \$143k/month for Mainframe Online Cost <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
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

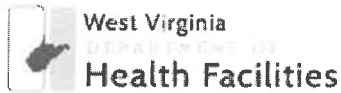
*For purposes of proposal and evaluation, all vendors should estimate enhancement cost for Year 1 at zero dollars (\$0).

Table 15: All-Inclusive Total Cost

All-Inclusive Total Cost	
Service	Cost
Total DDI Costs (Table 12 Total Cost)	\$ 162,675,000
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



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



Michael J. Caruso
DHF Cabinet Secretary



Alex J. Mayer
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: September 8, 2025

To: Shared Administration
Purchasing Division

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

Re: OPTUM INSIGHT
CDO MIS25*06 Change Order-2

The Office of Management Information Services and OPTUMINSIGHT Inc. are requesting approval for a change order to add an additional \$169,620.00 to CDO MIS25*06. Your approval for this change order is greatly appreciated.





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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									
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	1 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344
Notice of Process Address	C T CORPORATION SYSTEM 5098 WASHINGTON ST W STE 407 CHARLESTON, WV, 253131561
Principal Office Address	1 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344 USA
Type	Address

Officers

Type	Name/Address
Director	ROGER GERARD CONNOR 1 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344
President	ROGER GERARD CONNOR 1 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344
Secretary	ELIZABETH ANN SODERBERG 1 OPTUM CIRCLE EDEN PRAIRIE, MN, 55344
Treasurer	MARILYN VICTORIA HIRSCH 1 OPTUM CIRCLE 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

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

Annual Reports**Filed For**

2025

2024

2023

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Date filed

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

Monday, September 8, 2025 — 9:13 AM

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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
FEVEIN 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

COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>Crystal Hustead</u> Date: <u>9/17/25</u> Solicitation No. <u>CDO MIS25*06</u>	Agency: Management Information Services <hr/> Procurement Officer Submitting Requisition: Kimberly Beckett <hr/> Requisition No. CDO MIS25*06 <hr/> PF No.: 1573015
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This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

FOR ALL SOLICITATION TYPES:

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CRQM → CMA]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions (www.state.wv.us/admin/purchase/TCP.pdf)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
10	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FOR CHANGE ORDERS/RENEWALS:

1	Two-party agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Bond Rider (Cons.ruction)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.*

For Purchasing Division Use Only:

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: _____

Crystal Husead