



EDGE

Enterprise system for regulatory agencies

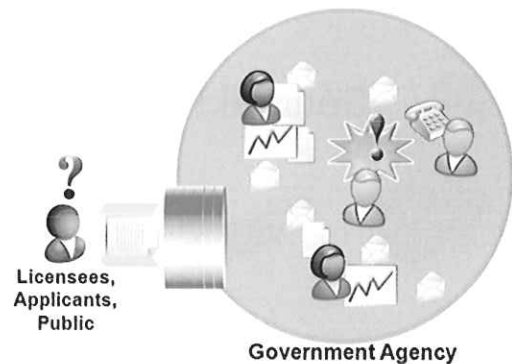
**Medical
Board
Edition**

VX Systems Inc. is dedicated to providing information technology solutions for health care practitioner regulatory entities. The nature of regulating health care professionals is complicated and involves the collaborative efforts of many agencies. Because of these intricacies and our experience in this field, VX Systems developed the EDGE suite of software solutions to provide a comprehensive set of tools your agency can utilize.

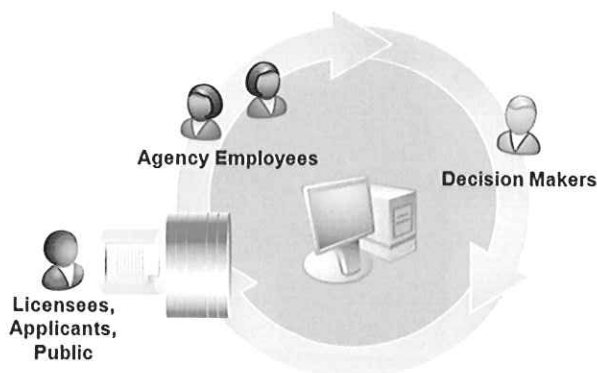
Government agencies struggle with maintaining a structured, streamlined process

Challenges:

- ✗ Licensees and citizens are increasingly dissatisfied with the lack of online forms processing.
- ✗ Processing paper-based forms is expensive, time consuming and error-prone.
- ✗ Sharing information across functional groups and agencies is difficult.
- ✗ Compliance with government initiatives for streamlining paperwork is complex.



Agencies benefit from the VX Systems' EDGE suite to automate paper-based processes



Solution Benefits:

- ✓ Achieve higher cost savings while meeting licensee and public demand for real-time access to information
- ✓ Improve access and analysis of information for better decision making
- ✓ Reduce time spent on administrative tasks
- ✓ Improve multi-agency communication and collaboration
- ✓ Reduce usage of paper, postage, time, and money

RECEIVED

2012 JUN 21 AM 9:55

WV PURCHASING
DIVISION

What can EDGE do for me?

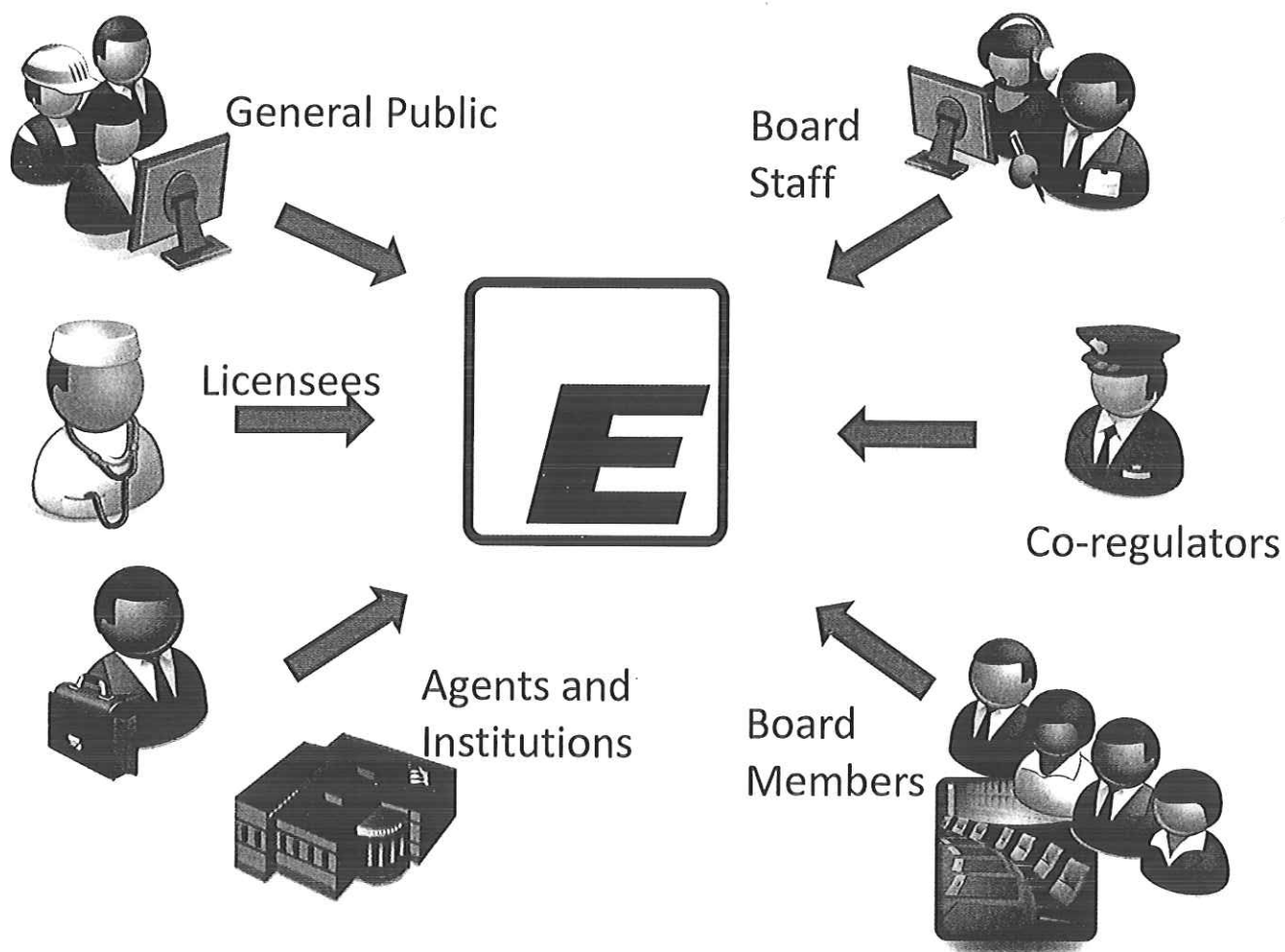
EDGE is a software suite comprised of internal and external web products and services.

To the general public, the software can provide licensee verifications and lookups.

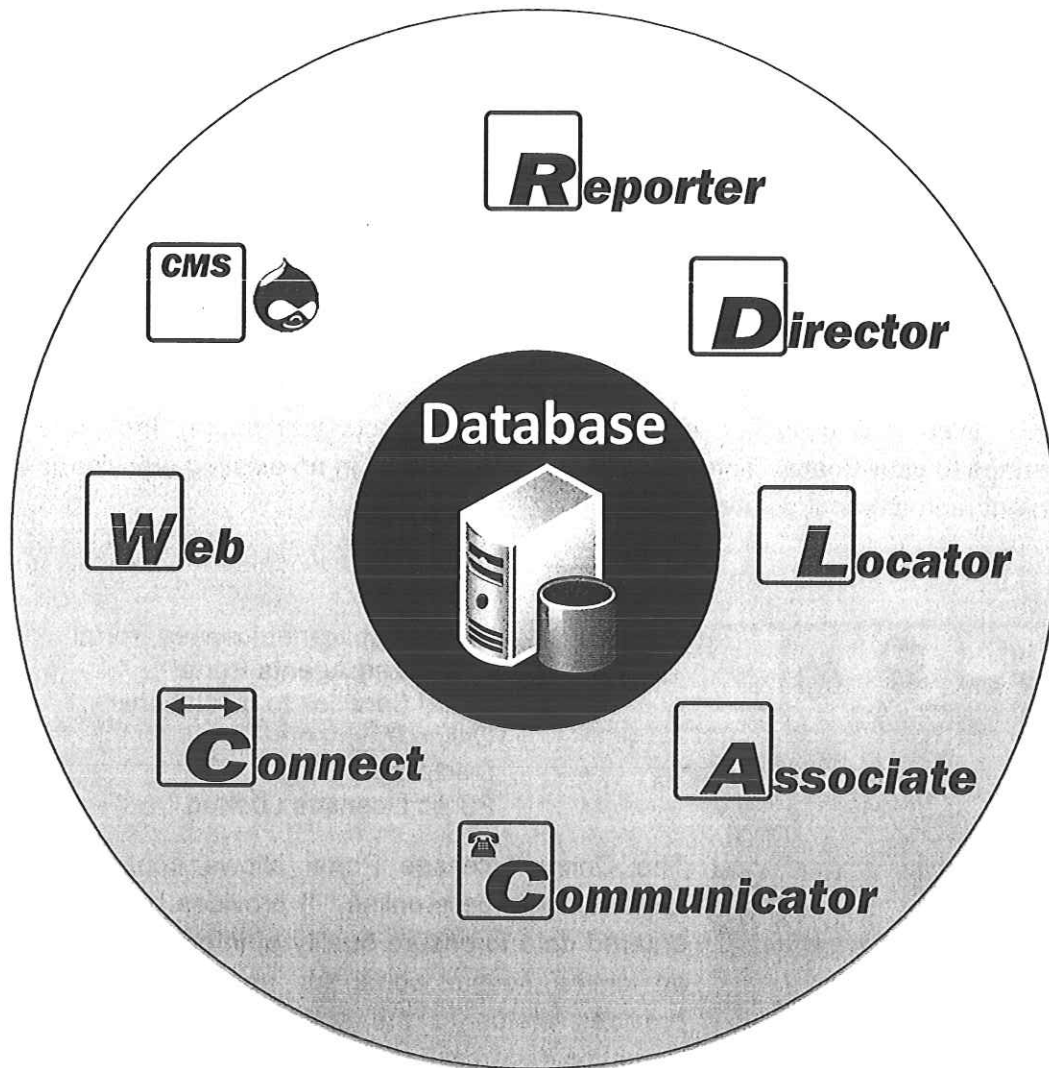
To applicants and licensees, the software provides a secure and private area to submit forms, change their information and check on the status of their applications.









To board staff, EDGE is a set of tools that helps manage all of that information.

Co-regulators and board members also have tools available to help them manage their respective tasks and duties.



The EDGE System is a set of components that use a central set of databases. These components work in conjunction to provide the tools needed to help you manage information at your agency.



-
-  **Web** – External web sites and connectors. Offers licensing, verification and other services.
 -  **CMS** – Content management system – Provides an easy to maintain web presence.
 -  **Director** – Internal contact/licensee management and workflow management.
 -  **Associate** – Document management
 -  **Connect** – Web service interface layer to external data partners (other boards and agencies, like FSMB)
 -  **Communicator** – Call log and communication management
 -  **Reporter** – Reporting system
 -  **Locator** – Physical document tracking system

Component Overview



CMS

EDGE takes advantage of already created and widely accepted content management systems to provide board staff with an easy to maintain website. Our preferred CMS is Drupal 7: an open-source system.

Using connectors, EDGE can extend the functionality and provide timely information into most CMS systems.



Web

EDGE Web is a collection of Internet-based products that supply the public an Internet interface to your Board. These products can be placed in an existing website or as a part of a content management solution.



Main facets include:

- Online Applicant/Licensee Portal
- Authorized Agents Portal
- Board Services to Institutions
- Online Payments
- Disciplinary Blog
- Public Licensee Lookup

The Online Licensee Portal allows applicants to begin the application process online. It provides baseline verification for entered data to ensure quality of information. The system has an online secure portal for applicants and licensees that provides status to the applicant for initial application and

renewals, as well as, the ability to update information (address, supervising, continuing education credits, documents, etc). All online forms are pre-populated with Board-held information, if present. The system accepts correspondence (signed forms, affidavits etc.) via fax, email, uploaded through a portal, and scanned.

Authorized agents (office staff or other third parties) can manage information on behalf of the physician or healthcare worker, such as renewals, change of address or change of supervision. Authorization control can be managed by a Board to allow as much, or as little, access as needed. Also, a verifying email to the licensee can act as the final approval of changed information or disclosures.

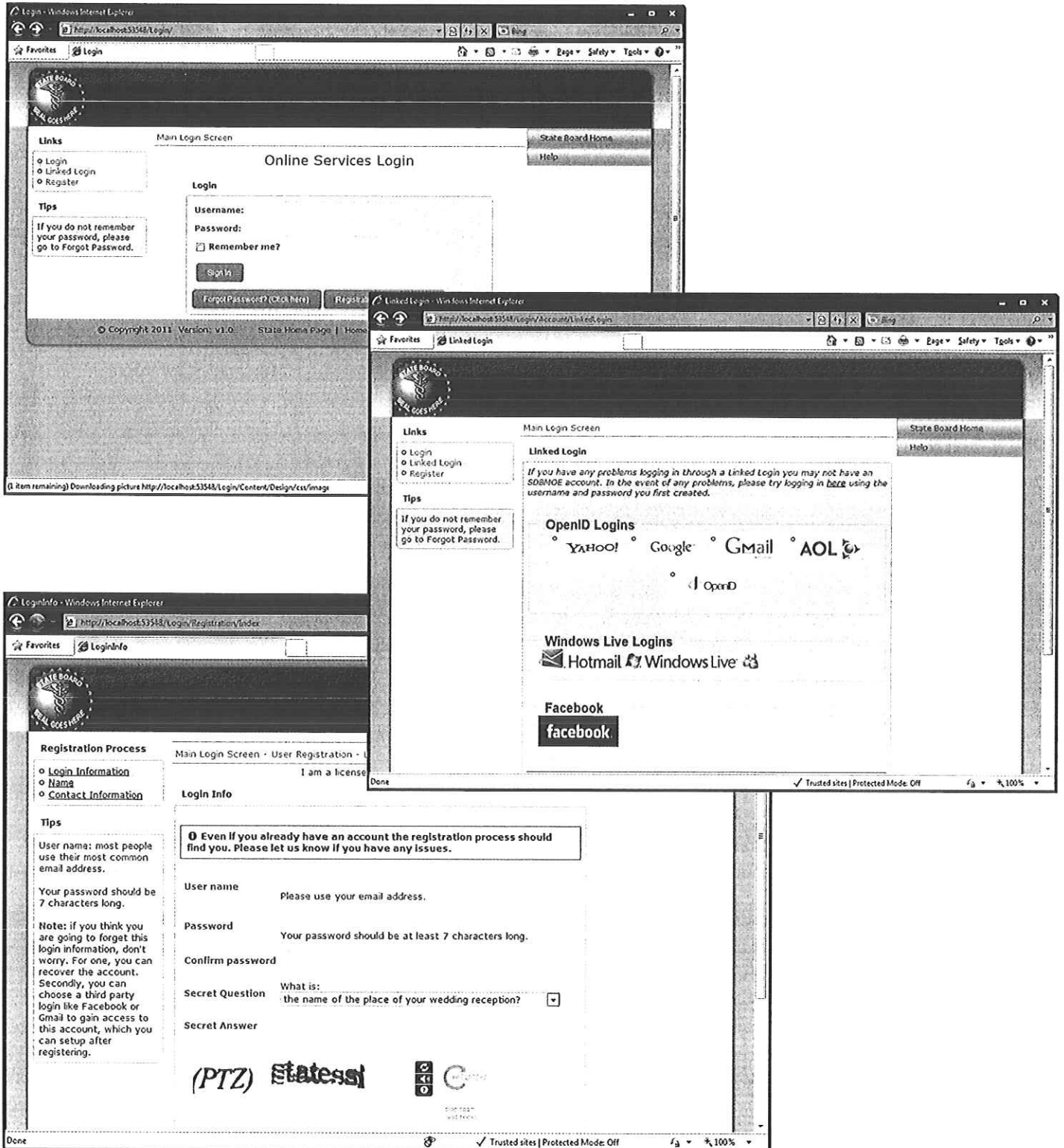
With **Web**, a variety of services can be offered to institutional customers, such as comprehensive verification or mailing lists. These Board services can have different price levels for different customers.

All fees involved can be paid for securely online through a variety of payment gateways (Authorize.net, Paypal, or other payment processing providers).

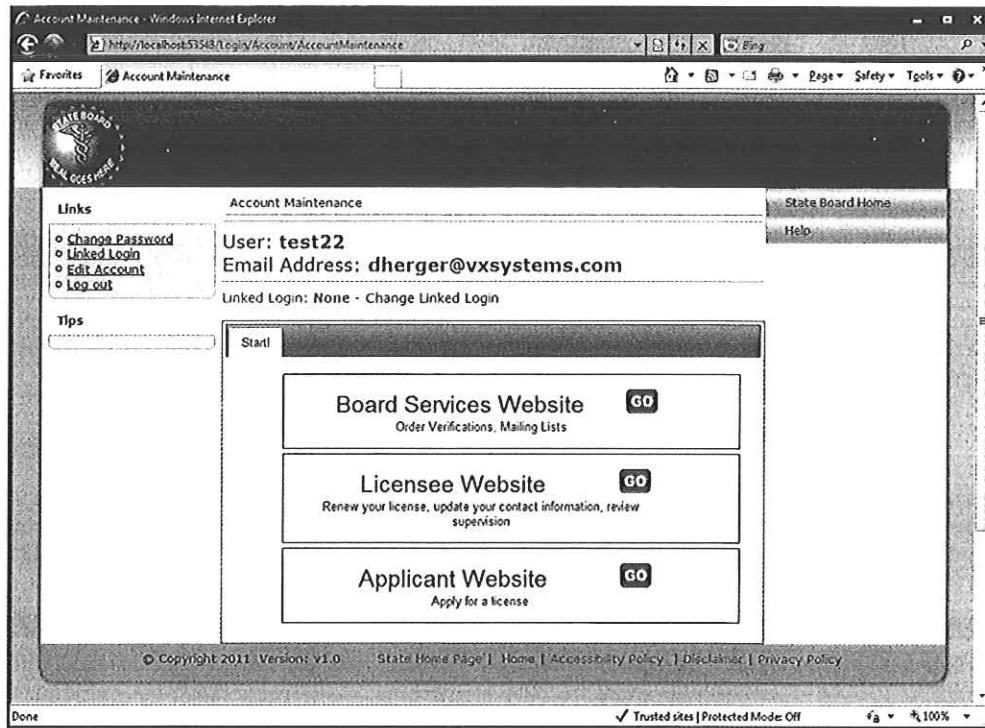
For the general public, online verifications can provide as much, or as little detail, as configured. Disciplinary actions taken by a Board can also be posted to a web log (blog) that supports RSS news feeds. These actions can be searched by name and date range as well.

Security

Web has a comprehensive and customizable user registration system allowing flexibility and a high level of security. User accounts can be set up with entering biographic information or by manual process: whichever fits your security needs. Different levels of security can be established for licensees, applicants or authorized agents.

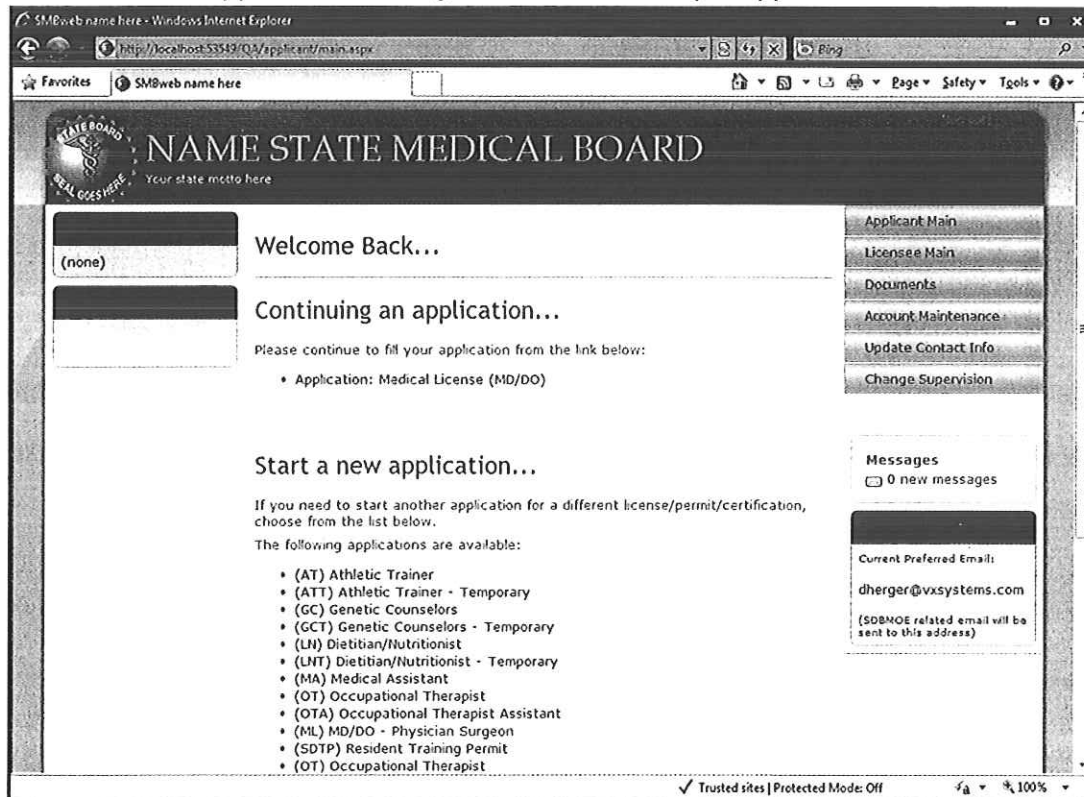


User accounts can have a variety of services available to them:



For Applicants

Applicants can begin or continue multiple applications:



When physical documents are needed, such as affidavits, release forms or anything requiring a signature or notary signature, the system will produce them for download. A barcode is also generated for matching the document when returned.

SMBweb name here - Windows Internet Explorer

http://localhost:53549/QA/applicant/applRelease.aspx?cdi=118068

NAME STATE MEDICAL BOARD

Your state motto here

(none)

Affidavit And Authorization For Release of Information

The first step in the application process is to complete the Affidavit and Authorization for Release of Information form. Please complete this form and appropriately return it to us in order to prevent delays in the processing of your application.

Affidavit and Authorization for Release of Information Form: (PDF Download)

- 1. This form must be notarized.
- 2. Sign in blue ink.
- 3. You must include an appropriate professional picture.

Sending to the Board:

Progress

Status: Not Submitted

- ☐ Release
- ☐ Name and ID
- ☐ Address
- ☐ Phone
- ☐ Email
- ☐ Addl Identifiers
- ☐ Medical School
- ☐ Postgraduate
- ☐ Exam History
- ☐ Other Licenses
- ☐ Work History
- ☐ Liability Claims

http://localhost:53549/QA/applicant/DocVaultViewer.aspx?docID=31385 - Windows Internet Explorer

http://localhost:53549/QA/applicant/DocVaultViewer.aspx?docID=31385

I will immediately notify the board in writing of any changes to the answers to any of the questions contained in this application if such a change occurs at any time prior to a license to practice medicine being granted to me by the board.

I understand my failure to answer questions contained in this application truthfully and completely may lead to denial, revocation, or other disciplinary sanction of my license or permit to practice medicine.

Applicant's Signature (must be signed in the presence of a notary)

Applicant's Printed Last Name

Applicant's Printed First Name, Middle Initial, and Suffix (e.g., Jr.)

Date of Signature

NOTARY

Dated _____ Signed _____

State of _____ County of _____

SUBSCRIBED AND SWORN TO before me this _____ day of, _____ 20____.

My commission expires: _____ (NOTARY PUBLIC SIGNATURE & SEAL)

Applicant Photograph

Securely tape or glue in this square a current front-view 2" x 2" passport-type color photograph of yourself.

Done

Unknown Zone | Protected Mode: Off

Each step of the application is wizard based, and individual edit screens have field level validation as needed.

SMBweb name here - Windows Internet Explorer
http://localhost:53549/QA/applicant/appAddress.aspx?cdfi=118219

NAME STATE MEDICAL BOARD
Your state motto here

(none)

Address information

Addresses:

Type	Public	Mailing
<input type="button" value="EDIT"/> <input type="button" value="DELETE"/> Home Address	Stephan J Example 1010 Clinic Dr Aubrey, TX	
<input type="button" value="EDIT"/> <input type="button" value="DELETE"/> Work Address	1333 Main St. Dallas, TX 75379	<input checked="" type="checkbox"/> Default

◆ Add a New Address

<< Previous Save, Next Page >>

Progress

Status: Not Submitted

- ☒ Release
- ☒ Name and ID
- ☐ Address
- ☐ Phone
- ☐ Email
- ☐ Add Identifiers
- ☐ Medical School
- ☐ Postgraduate
- ☐ Exam History
- ☐ Other Licenses
- ☐ Work History
- ☐ Liability Claims
- ☐ Practice Info
- ☐ Specialty Info
- ☐ DEA
- ☐ Disclosures

SMBweb name here - Windows Internet Explorer
http://localhost:53549/QA/applicant/appEmail.aspx?cdfi=118221

NAME STATE MEDICAL BOARD
Your state motto here

(none)

Email information

Emails: Note: We will send a validation email to the addresses listed below after your application is submitted for initial review. Please make sure that spam or email filters allow emails from "SDBMOE.gov".

Type	Public	Default	Email Address
<input type="button" value="EDIT"/> <input type="button" value="DELETE"/> Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	dherger@vxsystems.com

◆ Add a New Address

Progress

Status: Not Submitted

- ☒ Release
- ☒ Name and ID
- ☒ Address
- ☒ Phone
- ☐ Email
- ☐ Add Identifiers
- ☐ Medical School
- ☐ Postgraduate
- ☐ Exam History
- ☐ Other Licenses
- ☐ Work History
- ☐ Liability Claims
- ☐ Practice Info
- ☐ Specialty Info
- ☐ DEA
- ☐ Disclosures
- ☐ Health Disclosures
- ☐ Agreement
- ☐ Review
- ☐ Payment
- ☐ Confirm

Finish

Medical School info

List all medical schools you have attended, even those from which you did not graduate:

Add a new entry:

School Name: My Med School
City: Test City
State Or Province:
Country: (none)
Date Start: Jan MMM 1990
Date End: MMM
Degree Or Specialty:
Graduation Status: *
Grad Date / Anticipated: Feb MMM 1989 YYYY
Grad Date:

Message from webpage

Please correct the following
- Status is required

OK

Please correct the following
- Status is required

Save

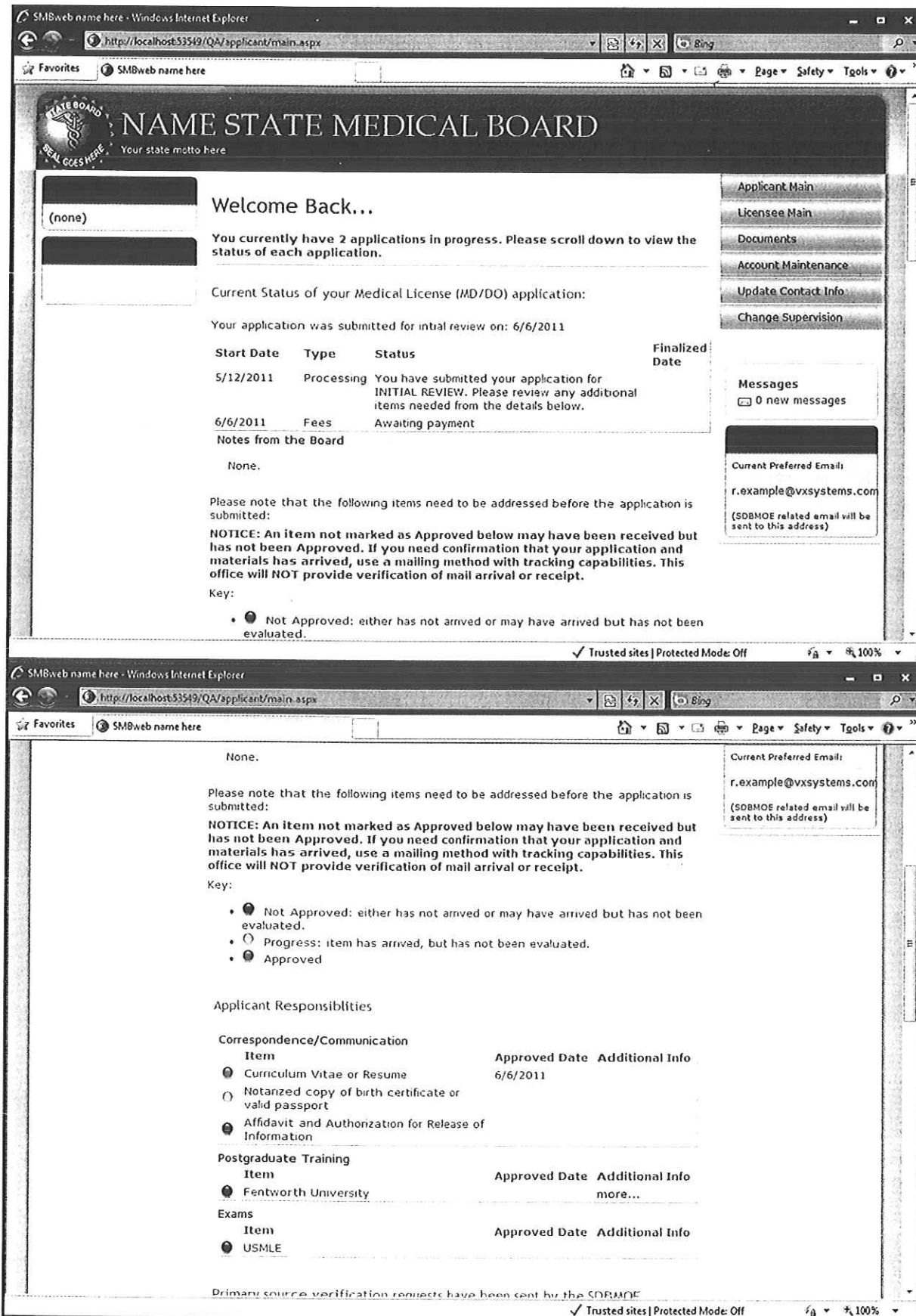
The above information is correct and up to date, ☐

Save, Next Page >>

Trusted sites | Protected Mode: Off

100%

After an application is complete and submitted, the applicant can periodically check there status online.



The screenshot displays the 'NAME STATE MEDICAL BOARD' website in a Windows Internet Explorer browser. The page title is 'NAME STATE MEDICAL BOARD' with a subtitle 'Your state motto here'. The main content area shows a 'Welcome Back...' message and a summary of the applicant's current status. A table lists the application details, including the start date (5/12/2011), type (Processing), and status (You have submitted your application for INITIAL REVIEW). A sidebar on the right contains navigation links for 'Applicant Main', 'Licensee Main', 'Documents', 'Account Maintenance', 'Update Contact Info', and 'Change Supervision'. Below the main content, there is a 'Messages' section showing 0 new messages and a 'Current Preferred Email' section with the address r.example@vxsystems.com. The bottom section, 'Applicant Responsibilities', lists items such as 'Curriculum Vitae or Resume', 'Notarized copy of birth certificate or valid passport', and 'Affidavit and Authorization for Release of Information', each with an 'Approved Date' of 6/6/2011. The page footer includes a note about primary source verification requests and a 'Trusted sites | Protected Mode: Off' status bar.

NAME STATE MEDICAL BOARD
Your state motto here

Welcome Back...

You currently have 2 applications in progress. Please scroll down to view the status of each application.

Current Status of your Medical License (MD/DO) application:

Your application was submitted for intial review on: 6/6/2011

Start Date	Type	Status	Finalized Date
5/12/2011	Processing	You have submitted your application for INITIAL REVIEW. Please review any additional items needed from the details below.	
6/6/2011	Fees	Awaiting payment	

Notes from the Board

None.

Please note that the following items need to be addressed before the application is submitted:

NOTICE: An item not marked as Approved below may have been received but has not been Approved. If you need confirmation that your application and materials has arrived, use a mailing method with tracking capabilities. This office will NOT provide verification of mail arrival or receipt.

Key:

- Not Approved: either has not arrived or may have arrived but has not been evaluated.
- Progress: item has arrived, but has not been evaluated.
- Approved

Applicant Responsibilities

Correspondence/Communication

Item	Approved Date	Additional Info
● Curriculum Vitae or Resume	6/6/2011	
○ Notarized copy of birth certificate or valid passport		
● Affidavit and Authorization for Release of Information		

Postgraduate Training

Item	Approved Date	Additional Info
● Fentworth University		more...

Exams

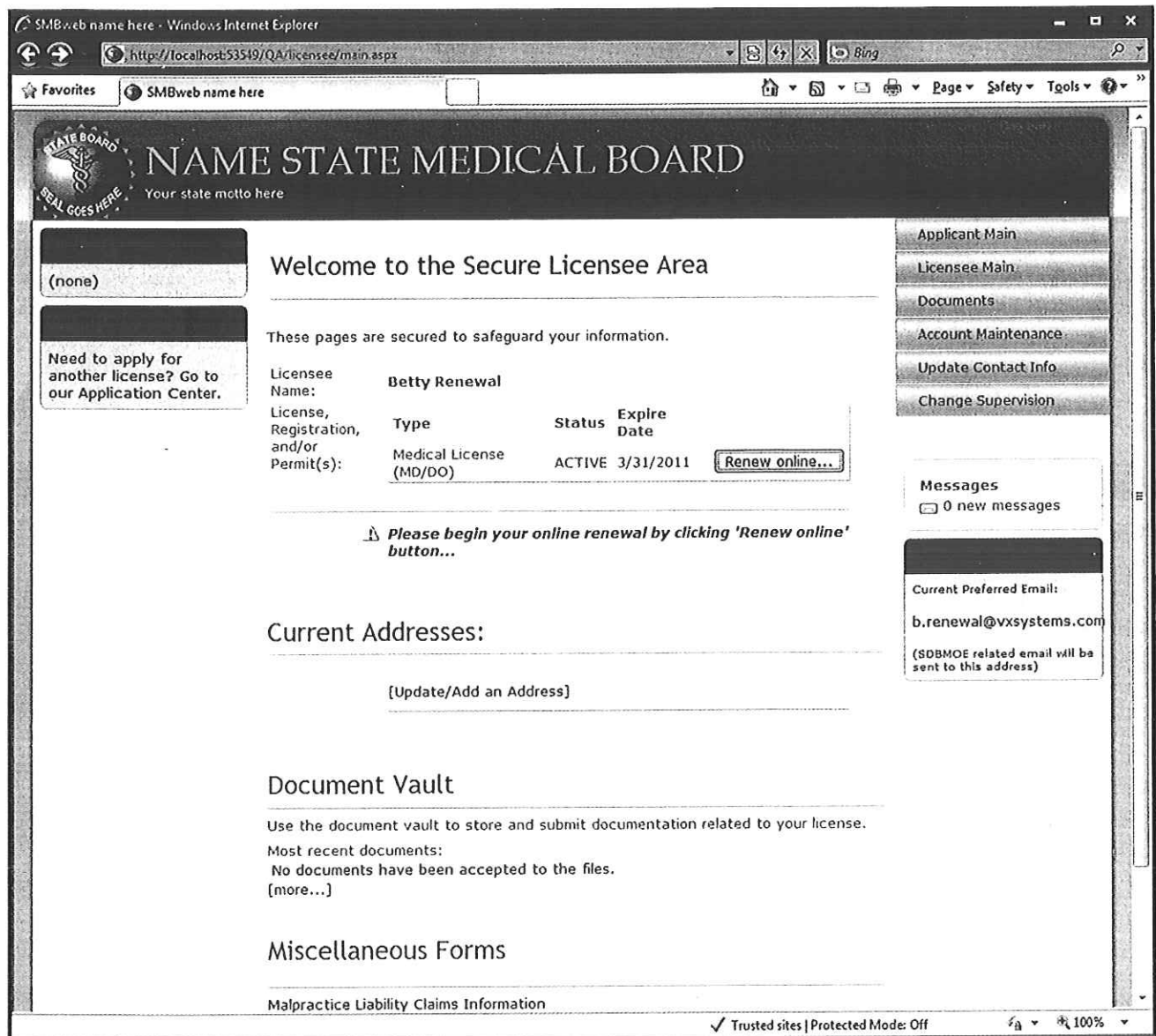
Item	Approved Date	Additional Info
● USMLE		

Primary source verification requests have been sent by the SDBMOE

Trusted sites | Protected Mode: Off

For Licensees

Existing licensees can log in and manage their information such as change of address and supervision (in case of PA's or other professions that require supervision). They can view the status of their existing licenses and renew them online.



The screenshot shows a web browser window titled "SMBweb name here - Windows Internet Explorer" with the address bar displaying "http://localhost:53519/QA/licensee/main.aspx". The page header includes the "NAME STATE MEDICAL BOARD" logo and the text "Your state motto here".

Welcome to the Secure Licensee Area

These pages are secured to safeguard your information.

Licensee Name:	Type	Status	Expire Date
Betty Renewal	Medical License (MD/DO)	ACTIVE	3/31/2011

[Renew online...](#)

Please begin your online renewal by clicking 'Renew online' button...

Current Addresses:

[\[Update/Add an Address\]](#)

Document Vault

Use the document vault to store and submit documentation related to your license.

Most recent documents:
No documents have been accepted to the files.
[\[more...\]](#)

Miscellaneous Forms

[Malpractice Liability Claims Information](#)

Right Sidebar:

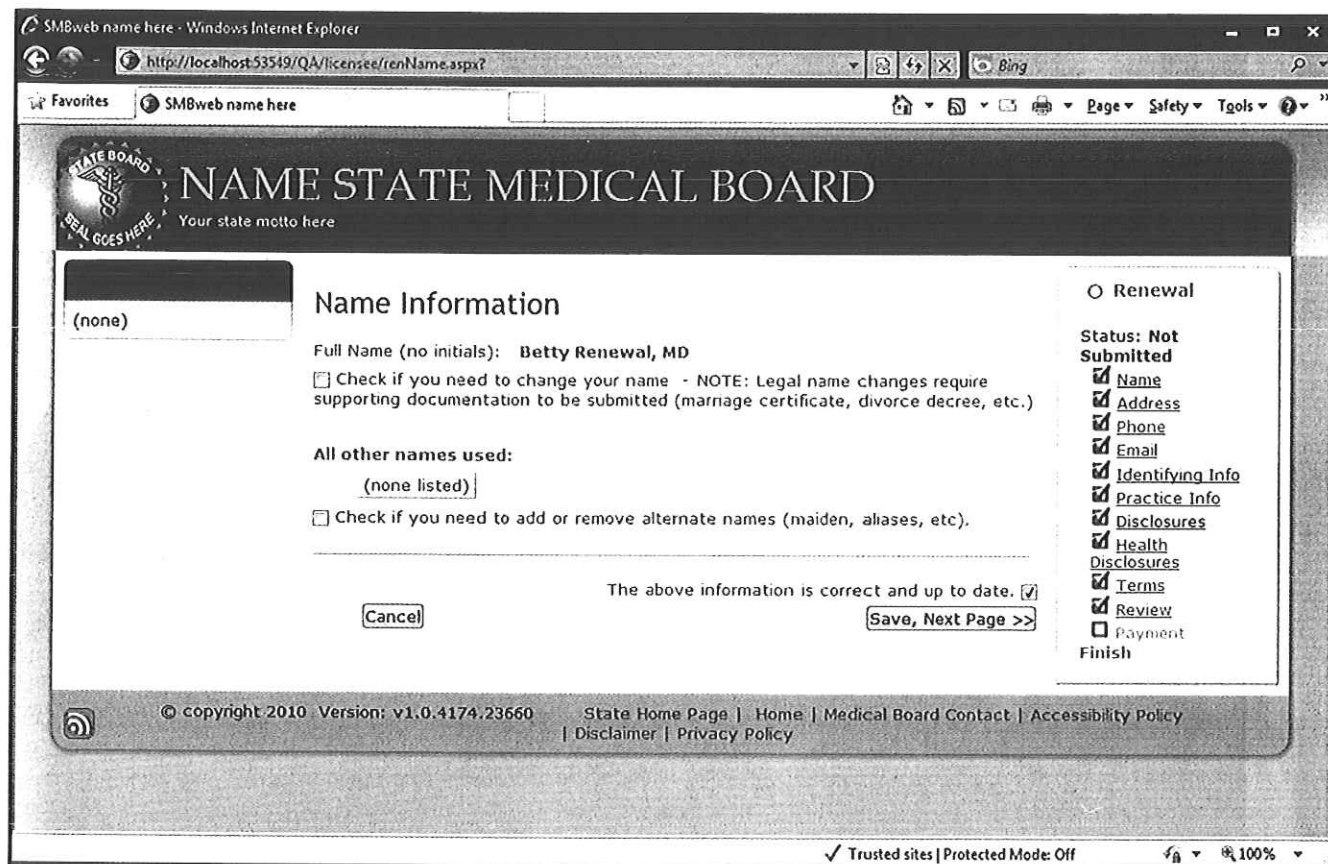
- Applicant Main
- Licensee Main
- Documents
- Account Maintenance
- Update Contact Info
- Change Supervision

Messages:
0 new messages

Current Preferred Email:
b.renewal@vxsystems.com
(SDBMOE related email will be sent to this address)

Footer: [Trusted sites](#) | Protected Mode: Off | 100%

Online Renewals allow licensees to review and update existing information. Pages and questions are configurable and if special information is required, those pages can be customized and easily added to the online application:



SMBweb name here - Windows Internet Explorer
http://localhost:53549/QA/licensee/renName.aspx?

NAME STATE MEDICAL BOARD
Your state motto here

(none)

Name Information

Full Name (no initials): **Betty Renewal, MD**

☐ Check if you need to change your name - NOTE: Legal name changes require supporting documentation to be submitted (marriage certificate, divorce decree, etc.)

All other names used:
(none listed)

☐ Check if you need to add or remove alternate names (maiden, aliases, etc).

The above information is correct and up to date. ☒

Renewal

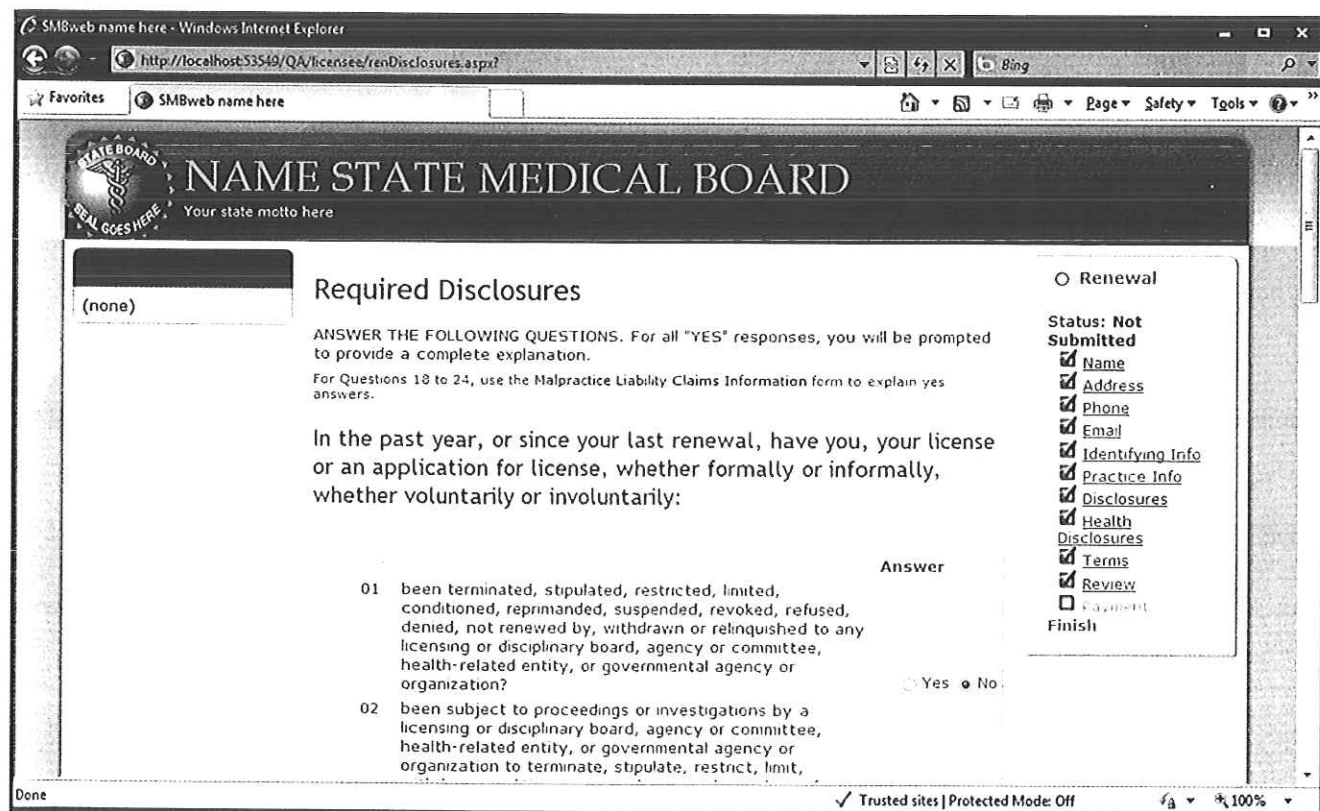
Status: **Not Submitted**

- ☒ Name
- ☒ Address
- ☒ Phone
- ☒ Email
- ☒ Identifying Info
- ☒ Practice Info
- ☒ Disclosures
- ☒ Health
- ☒ Disclosures
- ☒ Terms
- ☒ Review
- ☐ Payment

Finish

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Trusted sites | Protected Mode: Off 100%



SMBweb name here - Windows Internet Explorer
http://localhost:53549/QA/licensee/renDisclosures.aspx?

NAME STATE MEDICAL BOARD
Your state motto here

(none)

Required Disclosures

ANSWER THE FOLLOWING QUESTIONS. For all "YES" responses, you will be prompted to provide a complete explanation.
For Questions 18 to 24, use the Malpractice Liability Claims Information form to explain yes answers.

In the past year, or since your last renewal, have you, your license or an application for license, whether formally or informally, whether voluntarily or involuntarily:

Answer

01 been terminated, stipulated, restricted, limited, conditioned, reprimanded, suspended, revoked, refused, denied, not renewed by, withdrawn or relinquished to any licensing or disciplinary board, agency or committee, health-related entity, or governmental agency or organization? ☐ Yes ☐ No

02 been subject to proceedings or investigations by a licensing or disciplinary board, agency or committee, health-related entity, or governmental agency or organization to terminate, stipulate, restrict, limit, ☐ Yes ☐ No

Renewal

Status: **Not Submitted**

- ☒ Name
- ☒ Address
- ☒ Phone
- ☒ Email
- ☒ Identifying Info
- ☒ Practice Info
- ☒ Disclosures
- ☒ Health
- ☒ Disclosures
- ☒ Terms
- ☒ Review
- ☐ Payment

Finish

Done Trusted sites | Protected Mode: Off 100%

Payment screens can be flexible to allow credit card payments or a variety of other payment options.

SMBweb name here - Windows Internet Explorer
http://localhost:53549/QA/licensee/renPayment.aspx?cdfi=117586

NAME STATE MEDICAL BOARD
Your state motto here

(none)

Payment

Payment due: \$200.00

Pay By Credit Card

Name on the card

First: Betty
Middle:
Last: Renewal

Card Number only digits, no hyphens please.
Security Code 3 or 4 digit CVV2 or CVC code usually located on the back of your card
Exp. Date

Billing Address :
Street
City, State test South Dakota
Zip

Processing credit card transactions take time... After clicking on Process Payment please allow a few moments to process your information. Hitting Back on your browser, or refreshing this page after submitting could result in erroneous charges to your card.

Pay With Credit Card

Employer/Third Party is paying fee
Pay By Credit Card (sent in)
Pay By Check

<< Back to Review

Renewal

Status: Not Submitted

- ☒ Name
- ☒ Address
- ☒ Phone
- ☒ Email
- ☒ Identifying Info
- ☒ Practice Info
- ☒ Disclosures
- ☒ Health Disclosures
- ☒ Terms
- ☒ Review
- ☐ Payment

Finish

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Trusted sites | Protected Mode: Off 100%



Director

Director consists of a contact manager, licensing processor and workflow manager, all rolled into one bundled solution. The Director software also manages the different integrated modules such as Microsoft's SharePoint, Associate, and Web.

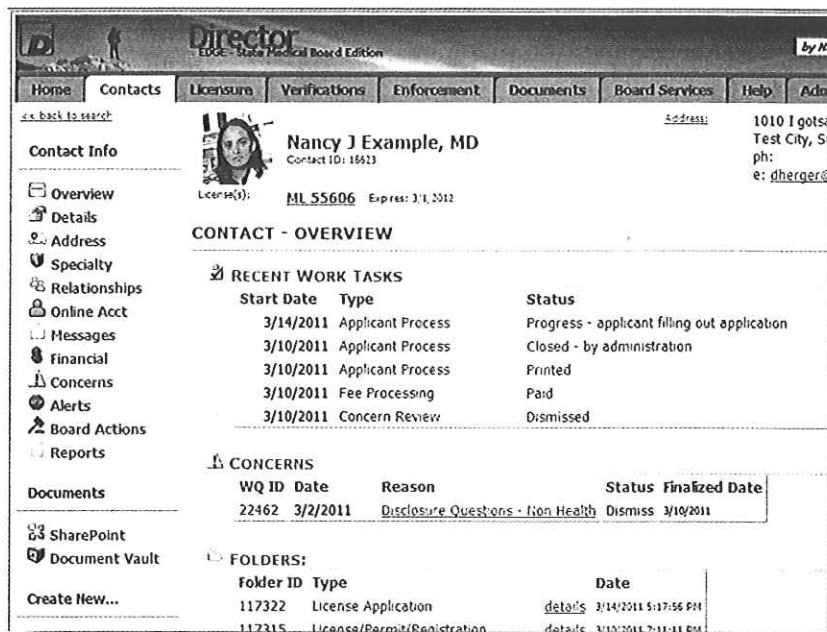
Contact/Licensee Management

Health care practitioners typically have a more complex data set than what is currently tracked by most systems.

Data elements such as licensing test scores (USMLE, NBOME, NCLEX), association specialties (such as the ABMS and AOA), and additional identifiers like controlled substance licenses, are built into the systems' data model. The EDGE system tracks the relationships between licensees and individuals at other agencies, both in and out of the state. For instance, the relationship between physician assistants and their supervising physician are usually maintained at a board of medicine. Relationships between physician and collaborating pharmacist would need to cross the boundary of agencies. There are several schemes to maintain this data, and some can be automated, depending on cross-agency collaboration.

Features of this system include:

- Partial match/heuristic searching
- Multiple name tracking (maiden, name changes)
- Multiple addresses
- Relationship tracking: ability to relate people in collaborations, supervisory/subordinate roles
- Temporary permits or permanent registrations
- Multiple licenses/permits/registration per individual
- Fully integrated with **Associate**, the document management system and Microsoft SharePoint.
- Enforcement and disciplinary tracking
- Automated notifications
- Health care-specific identifiers
- Health care-specific education and training tracking



The screenshot shows the Director software interface. The top navigation bar includes links for Home, Contacts, Licensure, Verifications, Enforcement, Documents, Board Services, Help, and Admin. The main content area displays contact information for Nancy J Example, MD, including her license number ML 55606 and expiration date 3/1, 2012. A sidebar on the left lists various modules like Overview, Details, Address, Specialty, Relationships, Online Acct, Messages, Financial, Concerns, Alerts, Board Actions, and Reports. The main area also shows a 'CONTACT - OVERVIEW' section with a table of recent work tasks and a 'CONCERNS' section with a table of work items. At the bottom, there is a 'FOLDERS' section with a table of folders.

Start Date	Type	Status
3/14/2011	Applicant Process	Progress - applicant filling out application
3/10/2011	Applicant Process	Closed - by administration
3/10/2011	Applicant Process	Printed
3/10/2011	Fee Processing	Paid
3/10/2011	Concern Review	Dismissed

WQ ID	Date	Reason	Status	Finalized Date
22462	3/2/2011	Disclosure Questions - Non Health	Dismiss	3/10/2011

Folder ID	Type	Date
117322	License Application	3/14/2011 5:17:56 PM
117315	License/Permit/Registration	3/10/2011 7:11:11 PM

Contact/License Management

Heuristic Search

vx.Director - Contacts - Windows Internet Explorer

http://localhost:17080/intra/contacts/Default.aspx

by Name Search

Welcome dherger

Home Contacts **Licensure** Verifications Enforcement Documents Board Services Help Administration

Contacts

Search
Reports
Create New
Individual
Institution
Workflows
Renewals
Initial Applicants
Coregulation (EMS)
Import Uniform App
Disclosure Review
Investigations
Concerns
Payments
Recent

License Number OR
Business Name
First Name
Last Name Example
City State ZIP
County
Search Clear criteria

Results:
Rows Displayed: 20

Name	License	Exp. Date	City	State	Zip
Greg E. Example	ML 55605	INACTIVE	Enmasse	SD	57000
Nancy J Example, MD	ML 55606	3/1/2012	Test City	SD	54001
Carolyn Eisenbeisz, MA	MA 0005	12/31/2011	Hosmer	SD	57401
Charles Example	ML 55602	INACTIVE	Sioux Falls	SD	54100
Evan E. Example, MD			Charlotte	SC	30211
Herman E. Example	ML 55604	3/1/2012	Dallas	TX	75000
Inga E. Example, MD	ML 55602	INACTIVE	Dallas	TX	54000
Joe PaperPA Example, PhD			Sioux Falls	SD	54000
Kevin M. Example, PA			Dallas	TX	75000
Lawrence Albert Example			Carrollton	TX	75044
Lawrence P. Example, PA			Dallas	TX	75001

Kevin M. Example, PA
Jerome A. Eckrich, Jr., MD
Lawrence P. Example, PA
Mike Example

Done

Trusted sites | Protected Mode: Off

100%

Contact Information

vx.Director Contact Viewer - Windows Internet Explorer

http://localhost:17080/intra/contacts/ContactViewer.aspx?cid=18628


by Name Search

Welcome dherger

Home Contacts **Licensure** Verifications Enforcement Documents Board Services Help Administration

back to search

Contact Info

 **Evan E. Example, MD**
Contact ID: 18628

Address: 1020 May Rd
Charlotte, SC 30211
ph:
e: e.example@vxsystems.com

License(s):

CONTACT - OVERVIEW

RECENT WORK TASKS

Start Date	Type	Status	Finalized Date
5/12/2011	Concern Review	New	details
1/27/2011	Applicant Process	Submitted to Initial Review	details
1/27/2011	Fee Processing	Unpaid	details

CONCERNS [\[more\]](#)

WQ ID	Date	Reason	Status	Finalized Date
22493	5/11/2011	Possible falsification of documents	New	

Documents

SharePoint
Document Vault

Create New...

License
Renewal
Concern
Alert
Investigation
Board Action
License App

FOLDERS:

Folder ID	Type	Date
117339	Concern	details 5/11/2011 12:00:00 AM
117281	License Application	details 1/27/2011 9:21:55 PM

JOURNAL [\[add\]](#)

Entry Date	Type	Author	Description
5/12/2011	DBSYS	dherger	Concern raised: Possible falsification of documents
5/12/2011	DBSYS	vx	Contact Created
1/27/2011	SYS	SDBMOEgov	Applicant submitted application for INITIAL REVIEW.
1/27/2011	DBSYS	vx	Application started

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Done Trusted sites | Protected Mode: Off 100%

Medical profession specific information

vx:Director - Contact - Windows Internet Explorer

http://localhost:17080/intra/contacts/ContactEditor_specialty.aspx?cid=18628

by Name Search

Welcome dherger

Home Contacts **Licensure** Verifications Enforcement Documents Board Services Help Administration

Back to search

Contact Info

Overview
Details
Address
Specialty
Relationships
Online Acct
Messages
Financial
Concerns
Alerts
Board Actions
Reports

Documents

SharePoint
Document Vault

Create New...

License
Renewal
Concern
Alert
Investigation
Board Action
License App

Evan E. Example, MD
Contact ID: 18628

License(s):

CONTACT SPECIALTY - EDIT

Specialty: **AI - ALLERGY & IMMUNOLOGY**

if 'Other', please specify:

Board Certified: **Yes**

Certifying Organization: **ABMS**

Certifying Agency: **American Board of Allergy and Immunology**

if 'Other', please specify:

Certificate Number: **555555**

Certification Date: **Feb 1995**

Recertification Date: **Feb 2005**

Expire Date: **Jan 2015**

or Lifetime Certification: **No**

Verified: **Yes**

Accepted By User: **dherger**

Accepted By Date: **6/1/2011**

1020 May Rd
Charlotte, SC 30211
ph:
e: e.example@vxsystems.com

Save **Cancel**

Trusted sites | Protected Mode: Off

License Management – View, create and manage multiple licenses or sub-licenses

vx.Director - Licensure - Windows Internet Explorer

http://localhost:17080/intra/licensure/LicenseView.aspx?cid=18623

by Name Search

Home Contacts Licensure Verifications Enforcement Documents Board Services Help Administration

Workflows

Nancy J Example, MD
Contact ID: 18623
ML 55606 Expires: 3/1/2012

Address: 1010 I gotsa Way
Test City, SD 54001
ph: e: dherger@vxsystems.com

LICENSURE - VIEW

Record ID	License Type Description	License Status	License Sub Status	License Number	Issue Date	Expire Date	License Track	License Track If Other	Formatted License Number	Record is active
13664	Medical License (MD, DO)	ACTIVE		55606	3/1/2011	3/1/2012	USMLE Endorsement		55606	Y

DOCUMENTS FOR THIS LICENSE (AND RENEWALS)

Name	Type	Date	Comment
Certificate/Card	Certificate and Card	3/10/2011	
Certificate/Card	Certificate and Card	3/10/2011	
Certificate/Card	Certificate and Card	3/10/2011	
Certificate/Card	Certificate and Card	3/10/2011	
Certificate/Card	Certificate and Card	3/10/2011	
Certificate/Card	Certificate and Card	3/10/2011	

Special Actions

PRINT LICENSE CARD
If you need to create a license card or regenerate the renewal card/certificate using up-to-date information (i.e. address change), then use this option.

Print

Recent

- Lawrence P. Example, PA
- Mike Example
- Lawrence Albert Example
- Nancy J Example, MD
- Jeffrey Lyle Stevens, MD
- Ralph Example
- Evan E. Example, MD
- Paul West, MD

Trusted sites | Protected Mode: Off

vx.Director - Licensure - Windows Internet Explorer

http://localhost:17080/intra/licensure/CreateLicense.aspx?cid=18623

by Name Search

Home Contacts Licensure Verifications Enforcement Documents Board Services Help Administration

Workflows

Nancy J Example, MD
Contact ID: 18623
ML 55606 Expires: 3/1/2012

Address: 1010 I gotsa Way
Test City, SD 54001
ph: e: dherger@vxsystems.com

LICENSURE - MANUALLY CREATE LICENSE

Warning: This form will create a license without regard to application process. Use this form if you wish to override normal processing or if there is no formal application process in the system.
Do not forget: You will also have to manually create a license card.

Record ID: (new)	Paramedic License
License Type	ACTIVE
License Status	
License Number	
Issue Date	
Expire Date	
License Track / Endorsement	(none)
License Track If Other	
License Type (abbrev.)	SDTP

Save **Cancel**

Trusted sites | Protected Mode: Off

Enforcement

Enforcement- track issues from concerns, to cases, to board actions

vx.Director - Enforcement - Windows Internet Explorer

http://localhost:17080/intra/enforcement/ConcernEditor.aspx?fid=117339&cid=18628&wqid=22493

vx.Director - Enforcement

Director
2008 - 2009 Medical Board Edition

Welcome dherger

by Name Search

Home Contacts Licensure Verifications Enforcement Documents Board Services Help Administration

back to contact

Enforcement

Disclosure Review
Concerns
Alerts
Cases

Workflows

Renewals
Initial Applicants
Coregulation (EMS)
Import Uniform App
Disclosure Review
Investigations
Concerns
Payments

Recent

Lawrence P. Example, PA
Mike Example
Lawrence Albert Example
Nancy J. Example, MD
Jeffrey Lyle Stevens, MD
Ralph Example

ENFORCEMENT - EDIT CONCERN

Evan E. Example, MD
License(s): [Contact ID: 18628](#)

Address: 1020 May Rd
Charlotte, SC 30211
ph: e: e.example@vxsystems.com

Status
Reason
Details

New - To Review
Possible falsification of documents
See disclosure #13

Initial Application
dherger (Dennis)
5/11/2011
[Go to SharePoint](#)

Special Actions
If this concern needs further investigation, you can promote this concern to a case. To add this concern to a investigative case, or create a case if one doesn't exist, use this option:
Add to/Create case

If this concern is great enough to halt automatic actions of the system (like batch renewal, etc) you can create an alert:
☐ Create an alert.

Save Cancel

Trusted sites | Protected Mode: Off

vx.Director - Enforcement - Windows Internet Explorer

http://localhost:17080/intra/enforcement/CaseEditor.aspx?fid=117344&cid=18628&wqid=22500

by Name Search

Home Contacts Licensure Verifications Enforcement Documents Board Services Help Administration


ENFORCEMENT - EDIT INVESTIGATIVE CASE

Enforcement

Disclosure Review
Concerns
Alerts
Cases

Workflows
Renewals
Initial Applicants
Coregulation (EMS)
Import Uniform App
Disclosure Review
Investigations
Concerns
Payments

Recent

Evan E. Example, MD 
License(s): [Contact ID: 18628](#)

Address: 1020 May Rd
Charlotte, SC 30211
ph:
e: e.example@vxsystems.com

Source of Investigation
Description
Status
Reported Date

External Report
License Document Forgery
Open
6/1/2011

Comments
(800 characters or less)

Case Files
[Go to SharePoint](#)

Special Actions
MANUAL OVERRIDE OF STATUS
Lifecycle of a case should be handled in SharePoint. If you need to manually override the status use the following:
This case is currently in status: **New - To Review**
☐ Change status of this case to:

USMLE transcript document: Step 1 attempts changed from 4 to 1. See details in Sharepoint.

Trusted sites | Protected Mode: Off 100%

Workflow Management

Regulating licenses or permits for healthcare professionals is more rigorous than other professions. With multiple stages of approvals and quality checks, the Director Workflow Management System can be configured to encompass your level of verification. While these checks are being performed, an anxious applicant wants

status updates. With the workflow management system in Director, along with EDGE Web, you can keep a detailed checklist of items to complete, while simultaneously providing a detailed status for the applicant through the online portal.

License Verifications Enforcement Documents Board Services Help Administration

APPLICATION - EDIT

License(s): Lawrence P. Example, PA
 Contact ID: 10098

Address: 100 Ford St
 Dallas, TX 75001
 ph: e: dnerger5@vixsystems.com

Application Type: **Physician Assistant License**
 Submitted Date: 3/4/2011 7:02:30 PM (via WEB)
 PROCESS MAP
 Current Status: Submitted to Initial Review
 CURRENT

[Advanced status change]

Standard Review

Complex Review

CHECKLIST

Subject	Category	Last Reviewed	Completed
<input checked="" type="checkbox"/> Curriculum Vitae or Resume	Correspondence/Communication	3/10/2011	3/10/2011
<input type="checkbox"/> Notarized copy of birth certificate or valid passport	Correspondence/Communication		
<input type="checkbox"/> Receipt and signature of Affidavit and Authorization for Release of Information	Correspondence/Communication		
<input checked="" type="checkbox"/> Personal Appearance Required	Correspondence/Communication		
<input type="checkbox"/> License at other board: Kansas PA 1234	Licenses		
<input type="checkbox"/> Education: University of Massachusetts	Education		
<input type="checkbox"/> Sealed Copy of Diploma: University of Massachusetts	Education		
<input type="checkbox"/> Official Transcript: University of Massachusetts	Education		
<input type="checkbox"/> Exams: NCCPA			
<input type="checkbox"/> Employment: Black Sheep			
<input type="checkbox"/> you need to send your undergraduate diploma			

Mark Complete

WORK TASKS FOR APPLICATION# 10098

Internal view of processing

Current Status of your Physician Assistant License application:

Your application was submitted for initial review on: 3/4/2011

Start Date	Type	Status	Finalized Date
3/4/2011	Processing	You have submitted your application for INITIAL REVIEW. Please review any additional items needed from the details below.	
3/4/2011	Fees	Awaiting payment	

Notes from the Board

None.

Please note that the following items need to be addressed before the application is submitted:

NOTICE: An item not marked as Approved below may have been received but has not been Approved. If you need confirmation that your application and materials has arrived, use a mailing method with tracking capabilities. This office will NOT provide verification of mail arrival or receipt.

Key:

- Not Approved: either has not arrived or may have arrived but has not been evaluated.
- Progress: item has arrived, but has not been evaluated.
- Approved

Applicant Responsibilities

Correspondence/Communication

Item	Approved Date	Additional Info
● Curriculum Vitae or Resume	3/10/2011	
● Notarized copy of birth certificate or valid passport		
● Affidavit and Authorization for Release of Information		
● Personal Appearance is Required		

Licenses

Item	Approved Date	Additional Info
● Kansas PA 1234		more...

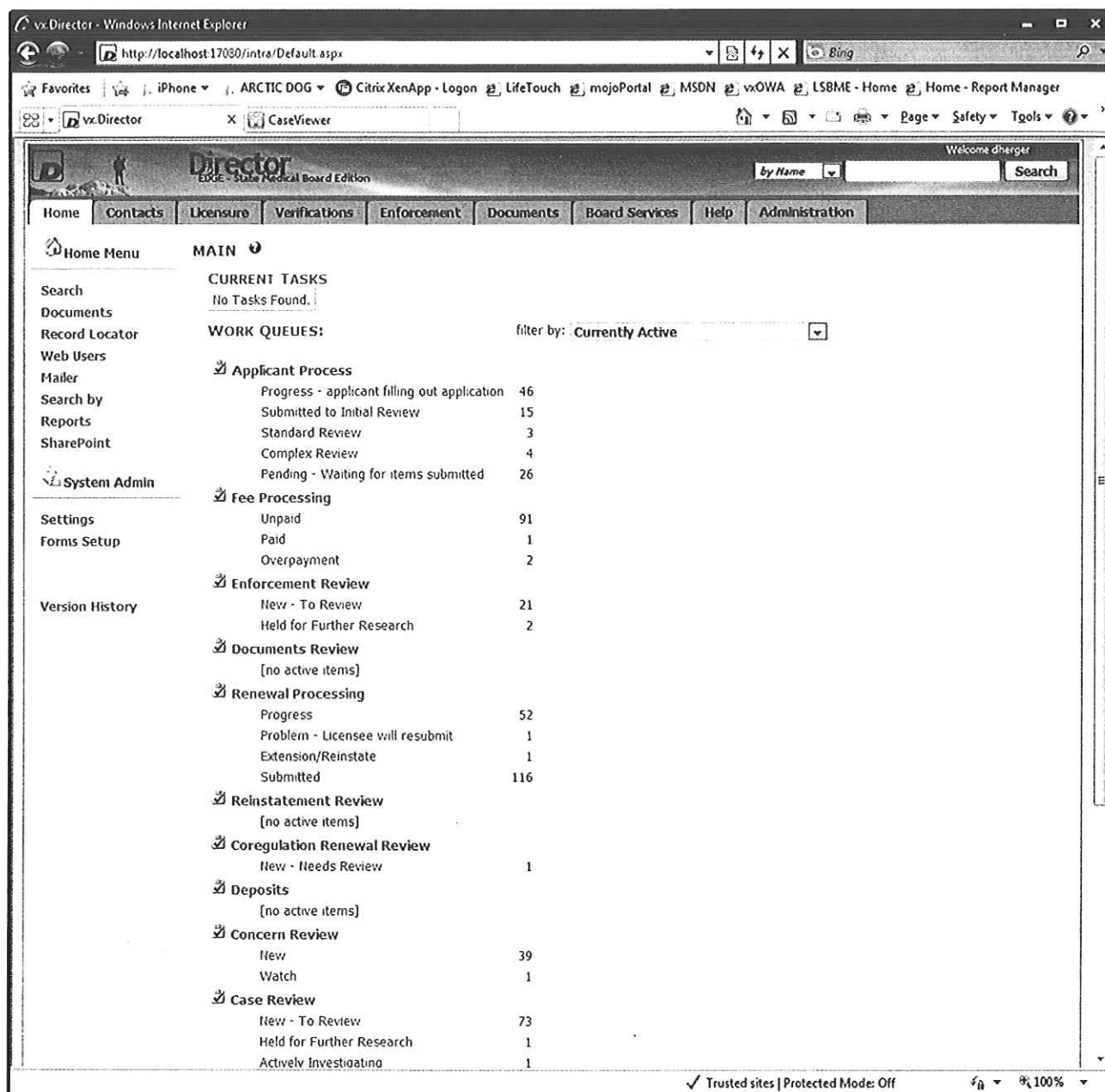
Education

Item	Approved Date	Additional Info
● University of Massachusetts		more...
● Sealed Copy of Diploma University of Massachusetts		

Applicant's status page

Workflow management screens

Workflow summary screen: Any process (such as initial licensure) can be split into different workflows, allowing different departments to perform work on the same item at the same time. For example, a licensing specialist can start verifying documentation, while a financial person can process the payments, and while an enforcement representative is reviewing concerns...all without tying each other up.



Director
EDGE - State Medical Board Edition

Welcome dherger

by Name [] Search

Home | Contacts | Licensure | Verifications | Enforcement | Documents | Board Services | Help | Administration

Home Menu

- Search
- Documents
- Record Locator
- Web Users
- Mailer
- Search by
- Reports
- SharePoint
- System Admin
- Settings
- Forms Setup
- Version History

MAIN

CURRENT TASKS
No Tasks Found.

WORK QUEUES: filter by: **Currently Active**

Process	Count
Applicant Process	
Progress - applicant filling out application	46
Submitted to Initial Review	15
Standard Review	3
Complex Review	4
Pending - Waiting for items submitted	26
Fee Processing	
Unpaid	91
Paid	1
Overpayment	2
Enforcement Review	
New - To Review	21
Held for Further Research	2
Documents Review	
[no active items]	
Renewal Processing	
Progress	52
Problem - Licensee will resubmit	1
Extension/Reinstate	1
Submitted	116
Reinstatement Review	
[no active items]	
Coregulation Renewal Review	
New - Needs Review	1
Deposits	
[no active items]	
Concern Review	
New	39
Watch	1
Case Review	
New - To Review	73
Held for Further Research	1
Actively Investigating	1

Trusted sites | Protected Mode: Off | 100%

New license application processing

vx.Director - Licensure - Windows Internet Explorer

http://localhost:17080/intra/licensure/ApplicantQ.aspx

vx.Director - Licensure

Welcome dherger

by Name Search

Home Contacts Licensure Verifications Enforcement Documents Board Services Help Administration

Workflows APPLICATIONS - PROCESSING Filter by: Submitted to Initial Review

Renewals Initial Applicants Coregulation (EMS) Import Uniform App Disclosure Review Investigations Concerns Payments

Print Queue

To Print

Renewals

Create New

Individual Institutions Management

Web Users

Filter by: (none)

Actions

Displaying 15 rows: Status = Submitted to Initial Review as of 6/7/2011 4:02:31 PM

WQ ID	Started Date	Submitted Date	Review	Name	License Type	Status	Flags
22425	1/27/2011	1/27/2011	<input type="checkbox"/>	Evan E. Example, MD	ML	IntReview	Details
22427	1/27/2011	1/28/2011	<input type="checkbox"/>	Francis J Example	ML	IntReview	Details
22442	2/25/2011	2/25/2011	<input type="checkbox"/>	Kevin M. Example, PA	PA	IntReview	Details
22444	3/4/2011	3/4/2011	<input type="checkbox"/>	Lawrence P. Example, PA	PA	IntReview	Details
22446	3/7/2011	3/8/2011	<input type="checkbox"/>	Lawrence Albert Example	PA	IntReview	Details
22451	3/8/2011	3/10/2011	<input type="checkbox"/>	Lawrence Albert Example	SDTP	IntReview	Details
22454	3/10/2011	3/10/2011	<input type="checkbox"/>	Mike Example	SDTP	IntReview	Details
22470	3/14/2011	3/14/2011	<input type="checkbox"/>	Mike Example	DI	IntReview	Details
22463	3/13/2011	3/14/2011	<input type="checkbox"/>	Oprah Example, PA	PA	IntReview	Details
22466	3/14/2011	3/14/2011	<input type="checkbox"/>	Oprah Example	AT	IntReview	Details
22473	3/16/2011	3/16/2011	<input type="checkbox"/>	Peter Example	RCP	IntReview	Details
22475	3/17/2011	3/17/2011	<input type="checkbox"/>	Peter Example	OTA	IntReview	Details
22477	3/21/2011	3/21/2011	<input type="checkbox"/>	Queen Example	OTAT	IntReview	Details
22492	5/12/2011	6/6/2011	<input type="checkbox"/>	Ralph Example	ML	IntReview	Details

Trusted sites | Protected Mode: Off

100%

vx.Director - Licensure

http://localhost:17080/intra/licensure/AppEditor.aspx?fid=117338&cid=18526&wqid=22492

Welcome dherger

by Name [] Search

Home | Contacts | **Licensure** | Verifications | Enforcement | Documents | Board Services | Help | Administration

APPLICATION - EDIT

[Application](#)
[Overview](#)
[Details](#)
[Address](#)
[School](#)
[PGT](#)
[Exams](#)
[Other Licenses](#)
[Work History](#)
[Malpractice](#)
[Specialty](#)
[DEA](#)
[Practice](#)

[View Submitted](#)

Ralph Example
Contact ID: 18526
License(s): **AT 0358** Expires: 7/1/2011

Address: 1001 Main St.
Sioux Falls, SD 54000
ph:
e: r.example@vxsystems.com

Application Type: **Medical License (MD/DO)**
Submitted Date: **6/6/2011 8:04:40 PM** (via WEB)
PROCESS MAP
Current Status: **Pending - Waiting for items submitted** [Advanced status change]

```

graph LR
    Amend --> Submitted
    Submitted --> StandardReview[Standard Review]
    StandardReview --> Pending
    StandardReview --> ComplexReview[Complex Review]
    Pending --> Approver[Approver?]
    Approver --> Approved
    Approved --> Printed
        
```

Documents

SharePoint Document Vault

Actions

Online Acct

Create License

Create Concern

Create Alert

Create Case

CHECKLIST [add/edit]

Subject	Category	Last Reviewed	Completed
<input checked="" type="checkbox"/> Curriculum Vitae or Resume	Correspondence/Communication		6/6/2011
<input checked="" type="checkbox"/> Notarized copy of birth certificate or valid passport	Correspondence/Communication	6/6/2011	6/7/2011
<input checked="" type="checkbox"/> Receipt and signature of Affidavit and Authorization for Release of Information	Correspondence/Communication		6/7/2011
<input checked="" type="checkbox"/> Postgraduate Training: Fentworth University	Postgraduate Training		6/7/2011
<input type="checkbox"/> Exams: USMLE	Exams		
<input type="checkbox"/> Employment: Test	Employment		

[Mark Complete]

WORK TASKS FOR APPLICATION# 10127

Start Date	Type	Status	Finalized Date	Complete
5/12/2011	Applicant Process	Pending - Waiting for items submitted	details	
6/6/2011	Fee Processing	Unpaid	details	

CONCERNS [more]

WQ ID	Date	Reason	Status	Finalized Date
22497		Disclosure Questions	New	

DOCUMENTS FOR THIS APPLICATION [add/edit]

Name	Type	Date	Comment
Affidavit and Authorization for Release of Information	Release and Authorization	5/12/2011	

Trusted sites | Protected Mode: Off

MAP
status: Pending - Waiting for items submitted

CURRENT

← [Icon] → [Icon] → [Icon] → [Icon] →

Move to Approval

This action will move the application to the "Needs Approval" status.

Applications in Approval status have all requested information received and reviewed. This step of the workflow is the final quality assurance step before final approval to issue a license and print the card.

Warning: You have 2 item(s) on the checklist that should be done before moving to this status.

- Exams: USMLE
- Employment: Test

Subject: Curriculum
 Notarized: [X]
 Reception of Informa: [X]
 Postgraduate: [X]
 Exams: US
 Employment: Test

Last Review: 6/6/20
 Communication: [X]
 Communication: [X]
 Communication: [X]

TASKS FOR APPLICATION# 10127

Workflows have rules associated at each step. For example, if you have checklist items that need to be completed before a certain workflow step, then a warning is given when trying to proceed.



Associate

A fully automated and fully integrated document management solution is critical for optimal operation. Forms that are generated by a Board that must be filled out by individuals outside of a Board are automatically loadable and recognizable in this system, along with the appropriate indexing information and supporting documentation. Forms that are generated by Boards are pre-populated with as much of the required information as possible. This will reduce the time required to complete the appropriate forms, as well as cut down on omissions and errors by outside individuals. This will also provide an avenue for Boards to change any outdated or incorrect information that is in the current system that would have been migrated to the new system. The system is also aware that these documents are expected and to provide workflows and notifications when appropriate. These documents include, but are not limited to, paperwork that requires a signature or notarization. For legal documentation concerning investigations, a simple and efficient system utilizing SharePoint Services Knowledge Management has been implemented. This would provide easy access to appropriate parties needing to update or review all information concerning a case. A Board would have one point of entry for documents that require imaging and multiple ways to retrieve those items. For credentialing from FCVS, the integrated document management system/knowledge management system automatically accepts an individual's data and images from the FCVS final packet.

Route this Document

Route this document to one of the defined locations...

File Name: PDFs
New File Name: USMLE document from FSMB

Frequently Used Database Sharepoint

Type Recent Contacts
Keyword(s) Examl

Search

ContactID	Name	License	Expre Date	Issue Date	City
18616	Herman E. Example	55604	3/1/2012	2/24/2011	Dallas
18617	Inga E. Example, MD	55602	2/17/2011	2/17/2011	Dallas
18618	Joe PaperPA Example, PhD				Sioux Falls
18619	Kevin M. Example, PA				Dallas
18620	Lawrence P. Example, PA				Dallas
18621	Lawrence Albert Example				Carrollton
18622	Mike Example	0764	6/1/2011	3/10/2011	Sioux Falls

Other Destinations

Save as...
Do not route this document; just move it to this location...

Save as...
Cancel

Help Customize

CaseViewer - Windows Internet Explorer

http://w2008dev-archi/sites/BoardNameHere/ShareAssets/CaseViewer.aspx

BoardNameHere - CaseViewer
Board Main SharePoint Site

Home Director Locator Report Server Board Meeting 2011-06-15 Search this site...

Contact Info

Licensee Name: Inga Example
License Number(s): MD 55602
Case Number: 00000

Case Documents

Type	Name	Modified	Modified By
	2010-03-01 184409 USMLE Transcript Submitted	6/7/2011 5:36 PM	D.C. Herger
	2010-02-13 USMLE Transcript received from FSMB - Inx	6/7/2011 5:38 PM	D.C. Herger

Investigations Calendar

June, 2011

S	M	T	W	T	F	S
23	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Case Tasks

Type	Title	Assigned To	Status	Priority	Due Date
	Review Educational History	test1	Not Started	(2) Normal	
	Contact Med School		Not Started	(2) Normal	
	Perform Site Visit		Waiting on someone else	(1) High	

Case Discussion

Subject	Created By	Replies	Last Updated
Complaint lodged over the phone	DEV Administrator	1	5/12/2011 2:00 PM

Phone Call Memo

Local intranet | Protected Mode: Off



Connect

EDGE **Connect** is a web service layer that connects Boards with other entities like FSMB, NPDB and hospital associations.

Using a secure and encrypted path, a Board can trade data back and forth with data-sharing partners seamlessly and without human intervention. For

example: An applicant starts to fill out an application at the Federation of State Medical Board's Uniform Application website. Toward the end of the process, FSMB servers contact that Board's servers and pass the application automatically, while the applicant is transferred to that specific Board's website. The applicant continues the application and submits, along with payment, to said Board. To the applicant, it is a smooth and uninterrupted process. To Board staff, the applications appear just as any others processed: no double entry, no special process.



Communicator

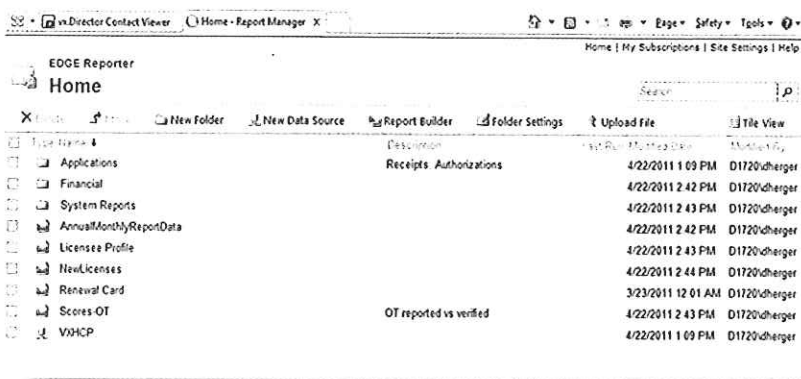
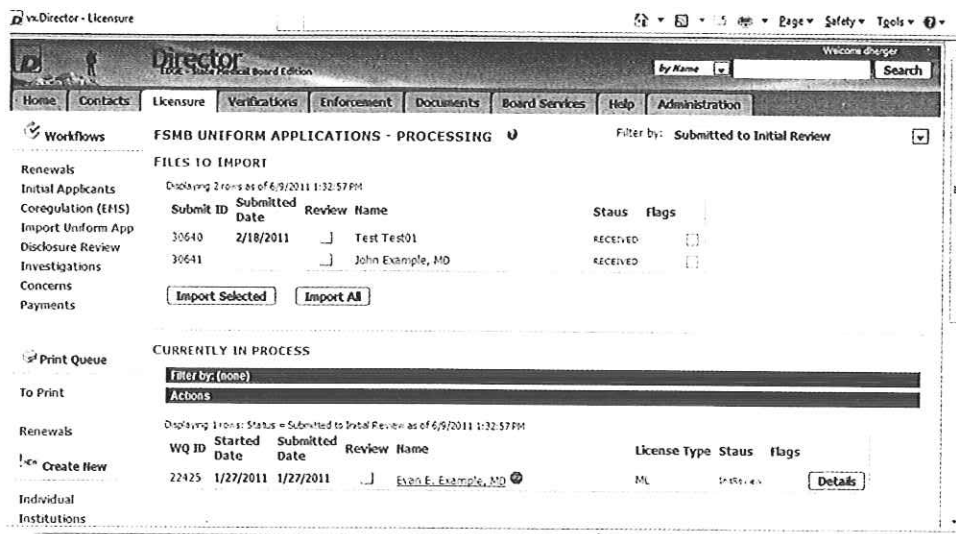
To provide a high level of support to your applicants and licensees, the **Communicator** product tracks phone calls and allows notes and follow-up flags. This information is readily available for when the licensee or applicant subsequently calls the board.



Reporter

Utilizing Microsoft's SQL Server Reporting engine, **Reporter** provides a single spot for all reports

of the system. Native ad-hoc abilities allow for rapid new report generation. Reports can be generated on-demand, or on a schedule, with a variety of delivery options. Templated documents, such as the license card and renewal notices, are also available for editing.





Locator

The **Locator** product organizes physical file folders. As much as we can scan and automate, the storage of original paper documents is sometimes required. The location of these files move from stations of process and need to be tracked. **Locator** identifies where and who has the physical folder during any process.



Technologies

EDGE is a Microsoft.NET-based product. It utilizes Microsoft Office (2007+), SQL Server and SharePoint. Typical installations require multiple servers for security and performance.

EDGE is also available as a cloud-based solution. Have a limited IT staff? Let VX Systems host your servers and we'll worry about scalability, backups and redundancy.

Service

Configured to serve YOUR needs

To define the configuration of the EDGE system and how it interacts with licensees and outside entities, VX Systems will perform an in-depth analysis of how your Board business is conducted. Key users of the system must be identified and interviewed to understand their perspectives of what is expected from the software, and what could be improved. Utilizing these interviews, "use-cases" of the system (or descriptions of what is required in the steps of performing a job) are discovered. A full due diligence of all requirements are then organized and documented in what is known as a Systems Requirements Specification (SRS). This is a high-level design document that would describe all components needed to build the various parts of a Board's system, how the system will work, and provides the basis of the workflow and assembly.

This understanding is needed to integrate the system successfully, in the right order, and at the right time. It also gauges and provides a better refinement, as well as scope, of each implementation. Extensive analysis would be performed on the current system to uncover inter-operability issues. In addition, project constraints and risks would be identified and recorded to the SRS document.

"Don't Worry about Technology" Subscription

Our subscription model keeps your system up-to-date with the latest technological improvements. Don't get stuck with an old technology solution that becomes obsolete when the technology industry changes. As new advancements such as smart phone apps or system level compatibility issues arise with Windows upgrades, the core EDGE suite is upgraded as well.

Company Background



VX Systems started as a team of information technology consultants coming together to offer software development, systems integration, hardware development, human resources, and placement services to a variety of industries.

VX Systems has a highly efficient team of developers to architect, design, develop and maintain new and legacy systems. Our careful planning of architecture and swift execution of architectural changes, enhances the stability of systems today, and allows systems to be more open and flexible to change in the future. Our systems are designed to be nimble and agile to better suit the needs of your

agency. We continuously enhance these systems so they can grow and evolve painlessly.

In the ever-changing world of information technology, inter-connectivity is constantly expanding. Social networking, business-to-business services and groupware now take the center stage over monolithic and disconnected systems. Our development team keeps a constant eye on these trends and technologies to integrate the best solutions into our products.

All team members are educated in information technology and credentialed in their fields, having Microsoft, Sun Microsystems, Network Infrastructure, Application Architecture, Design and Development accreditations.

Experience has taught us that among the 70 Member Boards of the Federation of State Medical Boards, no two are alike. Because of the unique way each Board conducts regulation, VX Systems has developed a solution suite that can be configured and customized to suit each Board's needs. Our solution is based on

"Our experience with the team at VX has been very favorable. We have found them to be accessible, highly responsive, resourceful and knowledgeable and consistently willing to go the extra mile to help us solve problems."

Dr. Robert Marier, MD
Executive Director
Louisiana State Board of Medical Examiners

industry- standard frameworks, such as Microsoft SharePoint and a collection of prebuilt modules and components. These components have been designed specifically for the health care regulation industry, and their customization and assembly are performed after an in-depth analysis of a Board is complete.

History

Since its founding in 1993, VX Systems Inc. has provided software consulting services to a gamut of blue chip companies and mid-size firms alike. VX Systems consultants are experienced in both development and support, with accreditations and certifications including Microsoft Certified System Development, Microsoft Operating Systems, Network Design, Oracle, Java, UML, J2EE, Enterprise Architecture, Design Patterns, and Unix Administration. VX Systems is a known entity in the state medical board sector. It participated in the initial development of the Federation of State Medical Boards' systems and a number of state agencies. Over the course of its 10-year relationship, VX Systems has unparalleled ground floor knowledge and experience with FSMB's legacy systems as well as ongoing new platforms. This knowledge about a particular business is irreplaceable. Its consultants are constantly learning and improving their skill sets to best serve its clients, their IT development and missions.

Contact Us

For more information on the EDGE for Medical Boards suite of products contact us at:

**17827 Windflower Way. STE 130
Dallas, TX 75252**

866.950.8299

information@vxsystems.com

www.vxsystems.com



Costs on combined project for WVBOM

Item

Software License¹

EDGE:Director, Web, Connect, Reporter	\$	25,000
EDGE:Associate (Document Management)	\$	7,000
EDGE:Locator, Communicator, Services	\$	7,000
Total Licenses	\$	39,000.00

Professional Services and Implementation²

Content Management System - Public Web Site (optional)	\$	10,000
Data Conversion (4 access DB to single Edge DB)	\$	10,000
Installation/Conversion to EDGE Components	\$	12,000
2 Site Visits (initial and Deploy/Training)	\$	5,000

Hosting

Hosting at Tier 3 Data Center	\$	4,000
Total Services	\$	41,000.00

Yearly Maintenance Subscription Cost \$24,000

Total **\$ 80,000.00**

¹Does not include the cost of hardware, or Microsoft licenses. Based on 1500 licensees.

²Costs for services and implementation are an estimate based on past experience. Your cost could vary depending on the simplicity/complexity of your current data and process needs.



Cost Schedule

Item	Cost	Year 1	Year 2	Year 3	Tentative Due Date
Initial License Cost/1st Site Visit	\$	10,000	\$ -	\$ -	upon receipt
Installation/Conversion/Customizing	\$	22,000	\$ -	\$ -	(billed as work performed) 3-4 Months
MILESTONE 1 - Content Management System Delivery	\$	10,000	\$ -	\$ -	
MILESTONE 2 - on delivery of new Licensing System (EDGE:Web, EDGE:Director, EDGE:Connect, EDGE:Reporter)	\$	15,000	\$ -	\$ -	
Training (Site Visit 2)	\$	5,000	\$ -		
MILESTONE 3 - on delivery of EDGE:Associate, EDGE:Locator, Communicator, any other remaining items	\$	14,000	\$ -	\$ -	
Initial Year Support/Customization	\$	-	\$ 36,000	\$ -	
Hosting Services	\$	4,000	\$ 4,000	\$ 4,000	
Yearly Maintenance Subscription (Support and scheduled updates)	\$	-		\$ 20,000	12 monthly payments of \$2000
Total	\$	80,000	\$ 40,000	\$ 24,000	



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

Request for Quotation

RFO NUMBER

OMB12001

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF

FRANK WHITTAKER
304-558-2316

V
E
N
D
O
R

VX SYSTEMS
12300 FORD RD, STE 130
DALLAS, TX 75234
ATTENTION: DENNISON HERGER

S
H
I
P
T
O

BOARD OF OSTEOPATHIC MEDICINE
405 CAPITOL ST STE 402
CHARLESTON WV
25301 304-552-6095

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS		
05/17/2012						
BID OPENING DATE: 06/12/2012		BID OPENING TIME 01:30PM				
LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		205-20-99-000		
WEB BASED LICENSING SYSTEM.						
THE WEST VIRGINIA PURCHASING DIVISION, FOR THE AGENCY, THE WEST VIRGINIA BOARD OF OSTEOPATHIC MEDICINE, IS SOLICITING BIDS FOR A WEB BASED LICENSING SYSTEM PER THE ATTACHED SPECIFICATIONS.						
ALL TECHNICAL QUESTIONS MUST BE SUBMITTED IN WRITING TO FRANK WHITTAKER IN THE WV PURCHASING DIVISION VIA EMAIL AT FRANK.M.WHITTAKER@WV.GOV OR VIA FAX AT 304-558-4115. DEADLINE FOR ALL TECHNICAL QUESTIONS IS 05/29/2012 AT 4:00 PM. ALL TECHNICAL QUESTIONS WILL BE ADDRESSED BY ADDENDUM AFTER THE DEADLINE.						
NOTICE TO PROCEED THE SYSTEM IS TO BE FULLY IMPLEMENTED WITHIN 5 MONTHS AFTER THE NOTICE TO PROCEED IS RECEIVED. UNLESS OTHERWISE SPECIFIED, THE FULLY EXECUTED PURCHASE ORDER WILL BE CONSIDERED NOTICE TO PROCEED.						
THE FIRST YEAR SUPPORT AND WARRANTY WILL BE ESTABLISHED BY FORMAL CHANGE ORDER UPON ACCEPTANCE OF THE SYSTEM BY THE AGENCY AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT.						
THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE		DATE		
TITLE		FEIN		ADDRESS CHANGES TO BE NOTED ABOVE		

WHEN RESPONDING TO RFO. INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
5. Payment may only be made after the delivery and acceptance of goods or services.
6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.html and is hereby made part of the agreement provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or Fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).



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

Request for Quotation

RFQ NUMBER
OMB12001

PAGE
2

ADDRESS CORRESPONDENCE TO ATTENTION OF
FRANK WHITTAKER
304-558-2316

RFQ COPY
TYPE NAME/ADDRESS HERE

BOARD OF OSTEOPATHIC MEDICINE
405 CAPITOL ST STE 402
CHARLESTON WV
25301 304-552-6095

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS		
05/17/2012						
BID OPENING DATE: 06/12/2012		BID OPENING TIME 01:30PM				
LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
WRITTEN NOTICE.						
UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT BY THE STATE OF WEST VIRGINIA, ITS AGENCIES, OR POLITICAL SUBDIVISIONS, THE TERMS, CONDITIONS, AND PRICING SET FORTH HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.						
RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.						
CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.						
OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)						
BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE		DATE		
TITLE		FIRM		ADDRESS CHANGES TO BE NOTED ABOVE		

UNOFFICIAL RESPONSE TO RFQ. INSERT NAME AND ADDRESS IN SPACE ABOVE LABELLED 'VENDOR'



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

Request for Quotation

RFQ NUMBER

OMB12001

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3

ADDRESS CORRESPONDENCE TO ATTENTION OF

FRANK WHITTAKER
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BOARD OF OSTEOPATHIC MEDICINE
405 CAPITOL ST STE 402
CHARLESTON WV
25301 304-552-6095

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05/17/2012				
BID OPENING DATE: 06/12/2012		BID OPENING TIME 01:30PM		

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
WITHOUT FURTHER ORDER.						
THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.						
REV. 01/17/2012						
NOTICE						
A SIGNED BID MUST BE SUBMITTED TO:						
DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130						
THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:						
SEALED BID						
BUYER: 44						
RFQ. NO.: OMB12001						
BID OPENING DATE: 06/12/2012						
BID OPENING TIME: 1:30 PM-----						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FBN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ INSERT NAME AND ADDRESS IN SPACE ABOVE LABELLED 'VENDOR'



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

Request for Quotation

RFQ NUMBER

OMB12001

PAGE

4

ADDRESS CORRESPONDENCE TO ATTENTION OF

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304-558-2316

RFQ COPY

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BOARD OF OSTEOPATHIC MEDICINE
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CHARLESTON WV

25301

304-552-6095

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BID OPENING DATE: 06/12/2012		BID OPENING TIME 01:30PM				
LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID:						

CONTACT PERSON (PLEASE PRINT CLEARLY):						

***** THIS IS THE END OF RFQ OMB12001 ***** TOTAL: _____						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE				TELEPHONE		DATE
TITLE		FAX		ADDRESS CHANGES TO BE NOTED ABOVE		

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

Request for Quotation

For E-Licensing Application with Disciplinary Management
and Website Design

May 17, 2012

WEST VIRGINIA BOARD OF OSTEOPATHIC MEDICINE

405 Capitol Street, Suite 402
Charleston, WV 25301



Introduction and Executive Summary

It is our desire to purchase an off the shelf licensure product that will allow our staff to streamline operations and enhance online capabilities through the implementation of a fully integrated web application and renewal system that operates exclusively off of a unified database. The system must provide functionality for re-designing the current website, online applications, renewals and securely provide web facing customers documents, calendars, news and articles. It must be run off of a unified database that provides searching, sorting and exporting of records for staff to manage record changes, print licenses and process payment.

It is critical that the system be an entirely web-based solution that is flexible through configuration. The system must have an administrative component that allows the staff to manage all records types, user interface screens, fields, reports, mail merges and email notifications. It also must allow internal staff to add additional record types, licenses, users, groups, fields, drop down values and manage different types of user access to the database system for future flexibility.

It is also critical that this system have the ability, if necessary, to be enhanced or customized for our specific deployment by custom application development. The system must have configuration screens that allow administrators the ability to manage security and setup different security for record types, fields, and ability to provide unique user access experience by job role for the entire database and administrative systems.

The database interface must have the ability to record contact with license holders and retain transactional history of the correspondence. All changes to data must be stored in a transactional record so historical audit reports can be created. The system must have the ability to store original document submissions such as an online application and specific renewal documents submitted from the online website by the licensee.

Fully integrated data for all license classes and types. Access to all record types/license classes, records available for correspondence, reporting and management in one interface/database. It should be simple to pull a list of licensees and their licenses in whatever configuration is needed by the staff.

Our hope is to have a single online database that serves as a central repository for all board functions: Licensing, online services, correspondence, reporting and record keeping. The system has to be configurable so we can change our system to meet our needs as our state code changes. The system must also have a proven track record with other state licensing boards who would be willing to serve as references upon request.

In the end, we need an online central repository to run our entire business and a redesign of our current website. It must give our staff the capability, on their own, to manage the board website and allow the board to perform their job duties and facilitate a robust online services environment. It's configuration must allow staff to make changes swiftly in response to changing legislation and it must have the ability for enhancements/customizations to be performed without technical skill by the provider, as the West Virginia Board of Osteopathic Medicine does not employ an information technician.

Business Overview & Background

The West Virginia Board of Osteopathic Medicine is a Chapter 30, professional licensing board in the State of West Virginia. We currently license just under 1100 osteopathic physicians, 200 osteopathic physician assistants, 77 PLLC's and 60 Corporations. We only have active and expired license types. If the licenses are restricted or on probation that is documented with an alpha character added to the license number to depict the type of action.

Our current database is a "home-grown" Microsoft 2003 Access database which is stored on the "C" drive of the Administrative Assistant's computer. The Executive Director has access to the database but it is limited. Our other office staff is the Legal Counsel who currently has no access to the database. We need a networked application allowing all three office staff equal access.

Besides licensing functions, the Board Office is given the responsibility by legislative mandate to protect the public through investigation of complaints filed against a licensee of the board. This requires the logging in of the complaint while following a legislatively mandated process for timely resolution. Currently, that process is done manually through Excel Spreadsheets which is not efficient nor timely. A complaint management application is needed.

As a state government licensing board, all financials are reported through a state managed system. Integration ability would alleviate duplicate entries.

Detailed Specifications

NECESSARY COMPONENTS:

- 1) Customized design of a robust web online service that will efficiently and automatically allow for management of license applications and renewals for all license classes.
 - a) Provide detailed real-time verification capabilities that include the ability to see public orders on disciplinary action.

- b) The application and renewal portion must be able to support name/address changes, payment processing, uploads of various documents and storage of those submitted documents in the associated database. It must also be able to place incoming data in the chronological sequence dictated by current office procedure.
 - c) The application and renewal system must also have a status capability so that users can check to see the application or renewal status themselves from the web.
 - d) System must support inspection reporting.
2. The database must handle multiple license types and facilitate the following items:
- a) Document repository capability to store application, renewal and historical documents and images.
 - b) A reminder system that supports recurrence and notification to multiple parties.
 - c) Transactional contact history must record multiple contact types including email, phone, in person meetings and letters.
 - d) Portal dashboard with permissions per staff person to see relevant job related snapshots. This must be configurable so staff can configure what is presented to each user level and what content each user has access based on security role.
 - e) Disciplinary case management and reporting. All modules must be configurable. As our needs change, so must the software.
 - f) Compliance management and reporting. System must be able to store documents, video and audio files with each case.
 - g) Work place impairment management and drug testing collection and reporting.
 - h) CME and CEU collection, management and reporting.
 - i) Quick printing capabilities for licenses, reports, letters and envelopes with mail merges.
 - j) Staff user customizable forms and reports that are printed from the database without additional programming.
 - k) All changes to data must be stored in a transactional record so historical audit reports can be created.

- l) Staff user customizable exports. Staff requires the ability to pick fields from the database into a user accessible template for reusable exports.
- m) Staff user customizable searches. Staff requires the ability to be able to perform various data-mining searches and save the searches for later use.
- n) The database software must be able to store and relate employment, licensee and pharmacy data properly for management and reporting purposes.
- o) System must store and report on the history of a record. All billing, demographic and licensing data must be stored by user id that changed the record and the date and time it was changed. Reports must be able to be customizable without additional programming.
- p) The system must have functionality that allows staff to create and manage workflow for automatically or ad-hoc generated tasks. Task management, user assignment and workflow modules must be integrated without additional programming.
- q) The system must handle revenue collections from the online applications, renewals and all other online services and be able to easily process manual payment in one convenient simple to use interface that automatically sends those payments to the West Virginia Treasurer's Office for posting to our revenue account.

3. Administrative Interface

- a) Ability to manage the website once it has been created. Staff requires the ability to be able to make timely edits to the website components. It must support internal staff to be able to create and manage all content on the website including:
 - i. New Articles
 - ii. Documents and other various resources such as forms, board minutes or instructions.
 - iii. Photos, media and video
 - iv. Calendars, schedules and newsletters
 - v. Events management
 - vi. Surveys

- vii. Notification system that is integrated into the database to pull and merge information.
- 4. Entire system must be fully integrated, meaning that it operates off of a single unified database.
- 5. The entire system must be an internet-based solution. Beyond the customization capabilities available in the administrative interface the proposal must also support the ability for the board to enhance the system per their unique future business needs.

Assumptions & Constraints

Successful vendor will be required to conduct, at least, one on-site visit prior to implementation to insure understanding of licensing board processes. All travel expenses incurred during development, training and implementation of the project should be included in that portion of the bid.

Terms and Conditions

The system must be fully implemented within five (5) months of signed contract. First year support/maintenance will begin the day after full implementation has been achieved and the West Virginia Board of Osteopathic Medicine has received full ownership of the system. First year support/maintenance will be added by formal change order upon acceptance of the system by the board with a fixed hard price for support/maintenance in year two (2) and year three (3).

Selection Criteria

Selection of an integrated, web-based, licensing application will be awarded to the low bid meeting ALL detailed specifications, as outlined in the RFQ.

Pricing Matrix

Requirement for the pre-implementation site visit:

Assigned Project Manager or other member of the implementation team should meet with the West Virginia Board of Osteopathic Medicine staff (3) at the Charleston, West Virginia office to review current office functions and processes. This will provide a foundation on which to efficiently and effectively customize the applications prior to implementation and go-live.

Pricing should be submitted as follows:

<u>Quantity</u>	<u>Description</u>	<u>Cost</u>	<u>Extended Cost</u>
3	User license with access for up to 1500 licensees	\$ 39,000.00	\$ _____
1	Website re-design	\$ 10,000.00	\$ _____
1	Data Conversion	\$ 10,000.00	\$ _____
1	Development, Training & Implementation	\$ 5,000.00	\$ _____
1	First year support/warranty	\$ 36,000.00	\$ _____
1	Second year support...	\$ 20,000.00	\$ _____
1	Third year support...	\$ 20,000.00	\$ _____
1	hosting @ tier 3 DATA CENTER	\$ 4,000.00	\$ _____
TOTAL BID			\$ 144,000.00

<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
80,000.00	40,000	24,000

* SEE COSTS ON COMBINED PROJECT FOR WVDOM
FOR MORE DETAIL

West Virginia Board of Osteopathic Medicine

May 17, 2012

RFQ No. OMB 12001STATE OF WEST VIRGINIA
Purchasing Division**PURCHASING AFFIDAVIT**

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owned is an amount greater than one thousand dollars in the aggregate

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, Limited Liability Company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

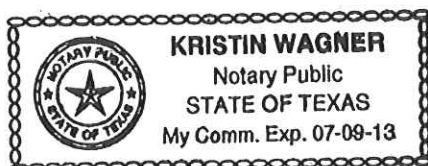
EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (West Virginia Code §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATUREVendor's Name: VX Systems IncAuthorized Signature: [Signature] Date: 06/20/2012State of TEXASCounty of COLLIN, to-wit:Taken, subscribed, and sworn to before me this 20th day of June, 2012.My Commission expires 07-09, 2013

AFFIX SEAL HERE

NOTARY PUBLIC



State of West Virginia

VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with *West Virginia Code*, §5A-3-37. (Does not apply to construction contracts). *West Virginia Code*, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the *West Virginia Code*. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. **Application is made for 2.5% resident vendor preference for the reason checked:**
☐ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,
☐ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,
☐ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; or,
2. **Application is made for 2.5% resident vendor preference for the reason checked:**
☐ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,
3. **Application is made for 2.5% resident vendor preference for the reason checked:**
☐ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,
4. **Application is made for 5% resident vendor preference for the reason checked:**
☐ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; or,
5. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**
☐ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; or,
6. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**
☐ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (*West Virginia Code*, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: _____ Signed: _____
 Date: _____ Title: _____

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

DOES NOT APPLY



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

WV PURCHASING ACT SECT Fax 304-558-4115

Jun 7 2012 08:15am P001/004

Request for Quotation

REQ NUMBER	PAGE
OMB12001	1

ADDRESS CORRESPONDENCE TO ATTENTION OF
FRANK WHITTAKER 304-558-2316

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BOARD OF OSTEOPATHIC MEDICINE
405 CAPITOL ST STE 402
CHARLESTON WV
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DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
06/06/2012				
BID OPENING DATE: 06/12/2012		BID OPENING TIME 01:30PM		

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
***** ADDENDUM NO. 1 *****						
THIS ADDENDUM IS ISSUED TO ADD THE ATTACHED ADDITIONAL TERMS AND CONDITIONS TO THE BID DOCUMENTS.						
THE BID OPENING DATE AND TIME HAVE NOT CHANGED.						
***** END ADDENDUM NO. 1 *****						
0001	1	LS		205-20-99-000		
WEB BASED LICENSING SYSTEM.						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FBN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
 2. The State may accept or reject in part, or in whole, any bid.
 3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
 4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
 5. Payment may only be made after the delivery and acceptance of goods or services.
 6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
 7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
 8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
 9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
 10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
 11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
 12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
 13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.html and is hereby made part of the agreement provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
 14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
 15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
 16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.
- I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).

OMB12001
ADDENDUM NO. 1

ADDITIONAL TERMS AND CONDITIONS

Various Legislative acts passed in the 2012 session require inclusion of certain provisions in all state contracts. Accordingly, this addendum will add the three provisions listed below to the solicitation and resulting contract entered into between the State of West Virginia and the vendor. In the event that the solicitation is not for construction or architectural/engineering work, sections 2 and 3 below will not apply.

1. **BACKGROUND CHECK:** In accordance with W. Va. Code § 15-2D-3, the Director of the Division of Protective Services may require any service provider whose employees are regularly employed on the grounds or in the buildings of the Capitol complex or who have access to sensitive or critical information to submit to a fingerprint-based state and federal background inquiry through the state repository.

After the contract for such services has been approved, but before any such employees are permitted to be on the grounds or in the buildings of the Capitol complex or have access to sensitive or critical information, the service provider shall submit a list of all persons who will be physically present and working at the Capitol complex to the Director of the Division of Protective Services for purposes of verifying compliance with this provision.

The State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check.

2. **SUBCONTRACTOR LIST SUBMISSION:** In accordance with W. Va. Code § 5-22-1, The apparent low bidder on a contract for the construction, alteration, decoration, painting or improvement of a new or existing building or structure valued at more than \$500,000.00 shall submit a list of all subcontractors who will perform more than \$25,000.00 of work on the project including labor and materials. This provision shall not apply to any other construction projects, such as highway, mine reclamation, water or sewer projects.

- a. **Required Information.** The subcontractor list shall contain the following information:

- i. Bidder's name
 - ii. Name of each subcontractor
 - iii. License numbers as required by W. Va. Code § 21-11-1 et. seq.

- iv. Notation that no subcontractors will be used if the bidder will perform the work
 - b. **Submission.** The completed subcontractor list shall be provided to the Purchasing Division within one business day of the opening of bids for review. Failure to submit the subcontractor list within one business day after the deadline for submitting bids shall result in disqualification of the bid.
 - c. **Substitution of Subcontractor.** Written approval must be obtained from the Purchasing Division before any subcontractor substitution is permitted. Substitutions are not permitted unless:
 - i. The subcontractor listed in the original bid has filed for bankruptcy;
 - ii. The subcontractor in the original bid has been debarred or suspended; or
 - iii. The contractor certifies in writing that the subcontractor listed in the original bill fails, is unable, or refuses to perform his subcontract.
3. **GREEN BUILDINGS MINIMUM ENERGY STANDARDS:** In accordance with § 22-29-4, all new building construction projects of public agencies that have not entered the schematic design phase prior to July 1, 2012, or any building construction project receiving state grant funds and appropriations, including public schools, that have not entered the schematic design phase prior to July 1, 2012, shall be designed and constructed complying with the ICC International Energy Conservation Code, adopted by the State Fire Commission, and the ANSI/ASHRAE/IESNA Standard 90.1-2007: *Provided*, That if any construction project has a commitment of federal funds to pay for a portion of such project, this provision shall only apply to the extent such standards are consistent with the federal standards.



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

WV PURCHASING ACA SECT Fax 304-558-4115

Solicitation

Jun 11 2012 04:50pm P001/002

NUMBER

OMB12001

PAGE

1

ADDRESS CORRESPONDENCE TO ATTENTION OF

FRANK WHITTAKER
304-558-2316

RFQ COPY

TYPE NAME/ADDRESS HERE

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BOARD OF OSTEOPATHIC MEDICINE
405 CAPITOL ST STE 402

CHARLESTON WV

25301

304-552-6095

DATE PRINTED

06/11/2012

BID OPENING DATE:

06/21/2012

BID OPENING TIME

01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
***** ADDENDUM NO. 2 *****						
THIS ADDENDUM IS ISSUED TO EXTEND THE BID OPENING DATE AND TIME.						
THE BID OPENING DATE AND TIME ARE EXTENDED TO 06/21/2012 AT 1:30 PM						
THE AGENCY RESPONSE TO TECHNICAL QUESTIONS WILL BE PROVIDED IN A SUBSEQUENT ADDENDUM.						
***** END ADDENDUM NO. 2 *****						
0001	1	LS		205-20-99-000		
WEB BASED LICENSING SYSTEM.						
SIGNATURE						
TELEPHONE						
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ADDRESS CHANGES TO BE NOTED ABOVE						

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

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I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or Fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

INSTRUCTIONS TO BIDDERS

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

WV PURCHASING ACA SECT Fax 304-558-4115

Solicitation

Jun 13 2012 03:47pm P001/008

NUMBER

PAGE

OMB12001

1

ADDRESS CORRESPONDENCE TO ATTENTION OF:

FRANK WHITTAKER
304-558-2316

RFQ COPY

TYPE NAME/ADDRESS HERE

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BOARD OF OSTEOPATHIC MEDICINE
405 CAPITOL ST STE 402

CHARLESTON WV

25301

304-552-6095

DATE PRINTED

06/13/2012

BID OPENING DATE:

06/21/2012

BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEMNUMBER	UNIT PRICE	AMOUNT
***** ADDENDUM NO. 3 *****						
ADDENDUM TO DISTRIBUTE THE ATTACHED INFORMANTION.						
***** END ADDENDUM NO. 3 *****						
0001	1	LS		205-20-99-000		
WEB BASED LICENSING SYSTEM.						
***** THIS IS THE END OF RFQ OMB12001 ***** TOTAL:						

SIGNATURE

TELEPHONE

DATE

TITLE

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ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

SOLICITATION NUMBER: OMB12001
Addendum Number: 3

The purpose of this addendum is to modify the solicitation identified as OMB12001 ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- ☐ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☒ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☐ Correction of error
- ☐ Other

Description of Modification to Solicitation: To Provide the attached Technical questions and answers.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: OMB12001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input checked="" type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

VX Systems Inc
Company

[Signature]
Authorized Signature

06/14/2012
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012

ATTACHMENT A

QUESTION LIST FOR RFQ OMB12001

- 1) Is the Board of Osteopathic Medicine requiring that the content management software be provided and supported by the same vendor as the licensing software? Answer: Yes
- 2) Is the WV Board of Osteopathic Medicine requiring that the website be designed by the licensing software vendor? Answer: Yes
- 3) Would it be beneficial to the board for analysis purposes to include hosting prices? Answer: Please include all hosting costs under the hosting field on the pricing page. The Board Office will not be hosting the software.
- 4) Has funding been secured for the duration of this project? If so, can the State disclose the budget allocated for this effort? Answer: Funds have been allocated through the Board's budget.
- 5) In order to meet the implementation timeline, is the Board open to changing its workflow and processes to adapt to the Vendor's best practices and use of existing protocols? Answer: No
- 6) Who investigates complaints against licensees? How many complaints are received per year? Of those investigators, what is the number of individuals that would be using this system? Answers: The Board Office Staff investigate complaints and report their findings to the Complaint Committee of the Board. Approximately 40 complaints/year are received. The Board Staff consists of three (3) members and they would be the only ones using the system.
- 7) What is a PLLC? Answer: Professional Limited Liability Company.
- 8) What is the lifecycle of a license? How often does it need to be renewed? Answer: A physician's license is renewed every two (2) years, a physician assistant's license is renewed every two (2) years, a corporation license is renewed every two (2) years and a PLLC is renewed annually.
- 9) Is Data Conversion expected to be performed as part of the initial implementation or can it be done after the solution has been deployed? Answer: Data conversion must be performed as part of the initial implementation. All data builds off of the initial data.
- 10) How large is the existing Access database? How many records? Answer: There are several different types of files within the database. We currently have just under 1200 osteopathic physicians, about 200 physician assistants, 50 Corporations and 80 PLLC's.
- 11) How many license types are currently managed by the system? Answer: Four (4) as listed above. Of course, there are different statuses for each license type (active, probationary, suspension, revocation, etc.)
- 12) What is the anticipated timeframe for vendor demonstrations and subsequent award of this project? Answer: We are hoping to have a signed contract by July 1 with implementation completed by January 2013.

- 13) Is there a preference towards a cloud-based solution or is the Board also open to a Client Hosted solution? Answer: It is the Board's intent to host the program on a vendor's servers unless it is in the best interest of the Board to have it hosted with the WV Office of Technology.
- 14) Is the Board open to sharing this solution with other Professional Licensing organizations in the State or will this strictly be a stand-alone system? We would be open to sharing the system as long as our data is stored on a secure platform which would not be accessible to other licensing boards.
- 15) Please clarify the expectation of training from the proposed vendor for this effort. Is it the desire to have the vendor support the State or to provide training directly? The vendor will provide the initial training to the three (3) Board Staff Members and ongoing support will be purchased through the vendor. This is not a state program, but a licensing board of the state of West Virginia.
- 16) The current website is using DotNetNuke as a content management system. Are you happy with the current system? Answer: No Please let us know how you feel about the current website so that we can decide which way to go in our quote. Answer: The current website is managed by the WV State Treasurer's Office. We have no management control of the site which is something we want to change. The agency is looking for a new system which will be managed by the Osteopathic Medical Board. .
- 17) Since it is hard to estimate what the additional work is, is it okay to just supply an hourly rate with a maximum cost? No, all quotes must be broken down as the pricing page indicates.
- 18) The RFQ says we should complete the development within five (5) months. Do we have a starting date decided? Answer: Yes, July 1, 2012. The RFQ states the system should be "implemented" within five months after signing of contract.
- 19) Where will final website be hosted? Do you rent our server or do you host the web application at your office? Answer: There is a place on the pricing page to include hosting costs with your agency. : It is the Board's intent to host the program on a vendor's servers unless it is in the best interest of the Board to have it hosted with the WV Office of Technology.
- 20) Is it possible that we can take a look at your database with the existing applications for a better, more precise understanding of the total work load needed..can you at least let us know how many databases need to be transformed and how many tables there are in total? Answer: There are four (4) current databases all written in Microsoft Access. As listed in the RFQ, we have files for approximately 1200 physicians, 200 physician assistants, 80 PLLC's and 50 Corporations.

- 21) If you can help us picture what needs to be done with more detailed information, we will be able to come up with a more calculated bid. Answer: The Board will require all professional licensing functions, i.e., applications, renewals, disciplinary and regulatory to be included in the fully integrated system.
- 22) We have difficulty understanding Page 7,1.a. Is it just about user authentication and role-based permission authorization? Answer: This is a standard procedure for professional licensing boards. Because we are a State Licensing Board, we are required to provide public access to certain information about our licensees. Once information is updated within our database on a licensee, it must be made available on our website for public access. However, what information is shared must be defined by the licensing board and the software must be flexible to accommodate that.
- 23) What is current payment processing method? Pay-Pal, Authorize.net? Answer: The current payment process was set up by the West Virginia Treasurer's Office as all of our online licensing payments are sent directly to our account at the Treasurer's Office. The license renewal system will need to interface with the WV Treasurer's Office "E-Pay" system.
- 24) Record of correspondence is usually set up in database tables to record emails, phone, meeting summaries and letters. No integration with Outlook or your SharePoint server will be included in the proposal. And as for the email record, only the main content is recorded, that is, the email attachment is not stored. If you need those "advanced features." please let us know. We can definitely implement them. Answer: Not needed. Only need to be able to track what correspondence was received, by whom, when and for what licensee.
- 25) It appears there will be quite a few online forms for the users to submit and many online reporting also. Can we have a look at samples of all those forms and reports? If you are still working on them, can we at least know how many forms and reports there will be? Answer: They are general letters, applications and reports used in general office processes using Microsoft Access, Excel and Word. The largest form would be the application form which is about 15 pages. Most are 1-3 pages..
- 26) How much customization will be needed for forms and reports? Is it just an ad-hoc report where the web user picks a date range and a department and then generates a report? Is it more complicated by hiding/showing a column in a report dynamically? If the design (layout) of a report remains the same, and data is the only thing changed based on the query, it will cost less time to develop. Answer: Some reports will be constant – required regularly with only the data changing. Customized reports are requested all the time from third party agencies, physicians, and the State of West Virginia. We need the flexibility to design a report based on a query using any user field in the database.

- 27) Can you tell us more about task management and workflow modules? How do you handle task management now? Can we take a look at the paper forms or related document? Answer: That is the purpose of the site visit -- to gain understanding of our processes and how your system can meet those needs. The Board Office is a staff of three (3)
- 28) Can we have the name of a contact person who is in charge of this project and communicate with us? More questions could come out and we need someone who can answer and clarify. Answer: All inquiries must go through the Board's Purchasing Agent, Frank M. Whittaker, WV Division of Purchasing, 219 Washington Street, East, Charleston, WV 25305, (304) 558-2316 or email: Frank.M.Whittaker@wv.gov.