

## Case Management Software

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WV PURCHASING  
DIVISION

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**Microsoft**  
GOLD CERTIFIED  
Partner

Security Solutions  
Advanced Infrastructure Solutions  
Networking Infrastructure Solutions  
Information Worker Solutions

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## Planet Technologies: Introduction

### Planet Technologies' Background

Planet Technologies, a corporation based in Maryland and founded in 1997, is an international professional consulting firm that provides expert knowledge in policy, process management, and the integration and customization of Microsoft technologies in diverse business environments. With nearly 100 employees, we are focused on meeting the needs of United States Public Sector customers including K-12, higher education, and state, local and federal agencies.

Planet understands the driving issues and concerns that Public Sector customers face today. To each engagement, we bring a proven track record with civilian and defense agencies, extensive planning and implementation experience, and the passion to help agencies succeed.

Planet Technologies was built around investing in and developing long term relationships with our customers and corporate partners. We receive consistent positive client feedback and as a result, we have many long-term client relationships - some even exceeding 10 years. Our employees have the experience and dedication to exceed our client's expectations every time.

Our combination of state-of-the-art methodologies, flexible solutions, and expertise in Microsoft best practices enables our professionals to help agencies meet critical challenges rapidly, keep them in the forefront of technology, and maintain the operational excellence that is the hallmark of top performing organizations.

### Our Services

Planet offers our client's flexibility in engagement models to meet every business need. We provide strategic planning and policy, project-based engineering and development, IT and business consulting support and services.

Our service models range from Blanket Purchase Agreements (BPAs), state contracts, sub-contracts, co-operative contracts, large federal government contracts, and staffing or on a per project basis. From its inception, Planet Technologies has worked closely with Microsoft field, vertical, consulting and solution teams to develop new solutions and deliver engagements based on best practices. Our longstanding relationship with Microsoft combined with our deep understanding of the role that technology plays in building a successful business means we can offer unmatched depth of knowledge and expertise. The result—affordable solutions that enable our customers to expand their infrastructure and enhance the support technology provides to the mission of their organizations.

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## The Planet Difference – A Unique Microsoft Relationship

Planet Technologies, 100% Microsoft focused and a Gold Certified Partner, is one of approximately 30 Microsoft National System Integrator (NSI) partners in the U.S. which gives us unprecedented access to the latest solutions, the best training, and many exclusive programs that we can offer to our clients. The Microsoft NSI designation was established for elite Microsoft partners to elevate their marketing and delivery strategies across multiple geographic and product segments. Microsoft NSI partners receive greater alignment and engagement of Microsoft field resources, collaborative marketing efforts, deeper product team engagement and executive sponsorship, giving them a competitive advantage in the channel.

In 2010, we were awarded as both a Microsoft Federal Partner of the Year and a State and Local Government Partner of the Year. These awards make us a five time Microsoft Federal Partner winner and a two time State and Local Government Partner winner!

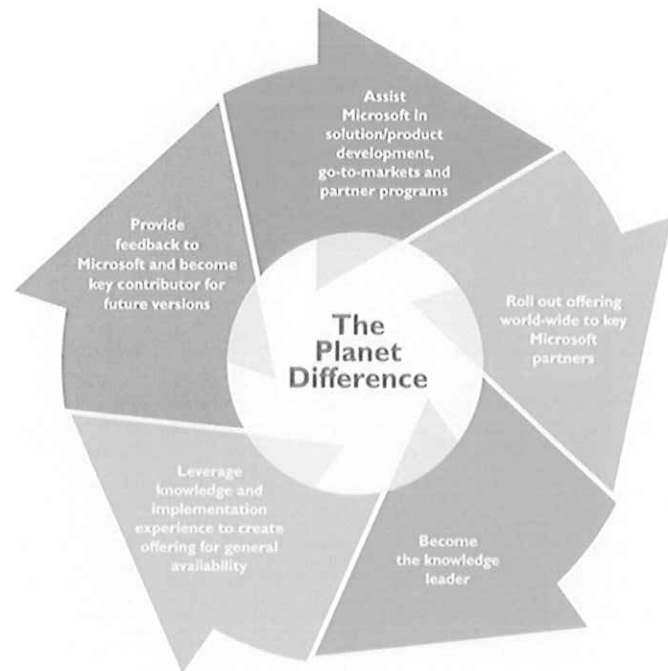
Planet has an office on the Microsoft campus where we are able to collaborate with managerial, technical and product teams on a daily basis.

We have extensive experience in Microsoft based technologies including a proven pedigree in server systems with a strong focus on data center automation and provisioning. As a result, we are uniquely positioned as the strongest choice of Microsoft Integrator Partners for handling these solutions.

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We work closely with Microsoft to co-develop, manage, and deliver technical and marketing programs focused on Windows Server 2008, SharePoint, Windows 7, MDOP, BPOS, Business Intelligence and Cloud computing.

By being part of the initial design and development of Microsoft solutions and then delivering many of the training sessions in support of them, Planet has grown to become one of the worldwide knowledge leaders in Microsoft solutions. We provide this knowledge to our valued customers and, in turn, provide insight from our clients to Microsoft product teams that leverage this operational insight to improve new releases. *This is the Planet Difference.*



We are regularly selected by Microsoft to evaluate new product releases as part of their Early Adopter Programs (EAP) and Technical Adopter Programs (TAP). Just recently, we participated in the Office 2010, Forefront 2010, SharePoint 2010 and Exchange 2010 TAP programs. Microsoft is one of our largest clients and we regularly support large internal projects for them as well as supporting a number of their largest worldwide clients in the areas of development, infrastructure and collaboration.

Planet has developed, in conjunction with Microsoft, custom programs for rapid technology deployments in the areas of System Center Operations Manager, SharePoint, SMS/SCCM, MS Exchange Messaging and Collaboration w/AD, and MIIS/ILM/FIM.

Planet is a regular partner and sub-contractor to Microsoft Consulting Services and we bring our unique skills and talent to many strategic worldwide engagements. These engagements have taken us across the U.S. and into 12 countries worldwide.

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## Technology Expertise

Planet has experience architecting and deployment experience in Microsoft solutions to customers ranging in size from 100 users to over one million users. We are experts in the areas of design, deployment, development and migrations of:

Technology Focus:	
Active Directory	Exchange Server
System Center Family	SharePoint Portal Server
Live@EDU and BPOS	Office Communications Server
Hyper-V	Remote Desktop Services
SQL Server	Deployment Automation
Windows Server and Desktop Operating Systems	Microsoft CRM
Microsoft Identity Lifecycle Manager	Forefront Technologies
Windows-based Hosting / Hosted Messaging and Collaboration	Visual Studio .NET Framework

## NSI Partner

One of 30 U.S. based Microsoft Partners to be managed as a member of the National Systems Integrator Program (NSI). This program recognizes Planet's superior service delivery as well as our close relationship to Microsoft. The Microsoft NSI designation was established for elite Microsoft partners to elevate their marketing and delivery strategies across multiple geographic and product segments. Microsoft NSI partners receive greater alignment and engagement of Microsoft field resources, collaborative marketing efforts, deeper product team engagement and executive sponsorship, giving them a competitive advantage in the channel.

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## Microsoft Awards

Microsoft Awards and Recognition for Excellence
Windows Client Partner of the Year Award in the deployment of Windows 7 - 2012
Microsoft State and Local Partner of the Year 2008-Present
Microsoft Dynamics Inner Circle and President's Club 2011
Microsoft Federal Civilian Partner of the Year 2008-Present
Five Time Microsoft Federal Partner of the Year (2005-2010)
Microsoft Public Sector Partner of the Year Award 2006

## Summary

Planet Technologies understands' the need of West Virginia Department of Health and Human Resources (DHHR) Office of Inspector General (OIG) Medicaid Fraud Control Unit (MFCU) to have an experienced contractor to deliver and implement a case management system that will provide a web based case management, tracking and reporting systems for initiating, planning, executing, controlling and reporting on prosecution and investigative assignments and activities.

Planet Technologies has 12 years of experience in case management software systems and upon contract award, Planet Technologies will provide all of the services by Planet Technologies employees.

Planet Technologies has more than the minimum insurance required by this contract and upon verbal offer of this contract, Planet Technologies will provide necessary certifications with the State of West Virginia DHHR as a certificate holder.

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## Mandatory's

1. Microsoft Dynamic CRM 2011 uses Microsoft SQL Server 2008 R2 for its backend database.
2. Microsoft Dynamic CRM 2011 utilizes Microsoft SQL Reporting Services for report generation and also provides the ability for users to create Ad-Hoc reports through the user interface.
3. Microsoft Dynamic CRM 2011 can be accessed on a Windows XP or later machine through Internet Explorer 7 or later. Microsoft Outlook can also access Dynamic CRM utilizing the Microsoft Dynamic CRM 2011 Outlook Client.
4. Microsoft Dynamic CRM 2011 is a web-based application which a rich users interface. Users will not need to worry about updating their software since the system is delivered over the web.
5. Microsoft Dynamic CRM 2011 is built using standard web technologies (i.e. ASP.NET, JavaScript & XML). The system can also be customized using JavaScript, Workflows & Plugins which are both written in .NET.
6. All updates to the software would be done to the servers within your CRM environment. This could range from 1 server to multiplying depending on the scale of your deployment.
7. Microsoft Dynamic CRM 2011 is a scalable web base application.
8. This would be handled in Microsoft Dynamic CRM 2011 through the use of Business Units. Users can only see items associated with their Business Unit.
9. Through the use of a custom build plugin any type of formatting rules can be applied to any field within the system. Planet Technologies has a plugin we've used to format phone numbers, zip codes and social security numbers. This could be extended to hand any other type of specific data formatting.
10. There are three ways this could be handled depending on how the event gets triggered and what exactly needs to happen. Those three options are Workflows, Plugins and/or a supported customization such as Silverlight or HTML 5.
11. By utilizing the built in timestamps on records entered into the system time tracking and reporting could be done by case, attorney and task.
12. Activities can be used to send out notification to certain individuals, groups of individuals and/or entire teams. Workflow can also be created to automatically send out notification during certain scenarios.



13. Microsoft Dynamic CRM 2011 can route cases from 1 status to another and/or route them from 1 team to another team. Task could be setup with each case and can be tracked and managed electronically through the system along with other activities such as emails & phone calls.
14. The main screen on each user could have a report/chart displaying time tracking information.
15. MFCU events can be tracked with the use of the build in Date/Time fields in Dynamic CRM. Users can easily enter in a date only or can enter in a combination of date and time.
16. Time tracking reports could be generated on per case bases or for an entire office through the use of SQL Reporting Services or the Ad-Hoc reporting capabilities.
17. Microsoft Dynamic CRM 2011 has built in status code field which can be extended to handle client's needs.
18. The website for Microsoft Dynamic CRM 2011 can be setup to allow users to access the site from within the office or outside of the office as long as they have an internet connection.
19. Microsoft Dynamic CRM 2011 uses XML to store is UI design which is then rendered by the browser.
20. If Microsoft Dynamic CRM Online is used them there is a guaranteed up time.
21. Microsoft Dynamic CRM 2011 stores all of its information in a relational database. Therefore, all information related to a case will be linked together and any files uploaded into a given case will also be stored electronically within the system and linked to it.
22. Microsoft Dynamic CRM 2011 keeps track of the individual who created and modified a record. If the audit feature is turned on it also keeps track of field level changes. Such as old value, new value and the user that performed the change. Therefore, you can determine the involvement of an individual on a particular case.
23. Individual users can change their default view for any entity within the system and also change the default pane and tab that loads when they first log into the system though the users options menu.
24. Microsoft Dynamic CRM 2011 has a built in Dashboard feature which can be customized and shows only relevant information based on who is logged it. Each user can also make changes to their specific dashboard to meet their business needs. Uses can also run searches from any of the views or perform an advance search where users can build more complicated queries.
25. Each group would only see cases assigned to their group through the use of Business Units. While MFCU Administrators would be able to see all the cases through the system.
26. All forms, views and views are able to be customized through the system. Therefore MFCU should be able to modify the forms, views, and fields to meet their needs.

27. Microsoft Dynamic CRM 2011 has built in duplicate detection. Duplicate detection can run as a schedule job where a report is sent to a desired individual(s) or it can run in real time and alert the user at the time of data entry.
28. Microsoft Dynamics CRM 2011 provides several integration points with third party software programs. Native functionality exists to capture and open website addresses from a record in CRM. Files can be attached to a record, or stored in a document repository such as SharePoint or other third party utilities.
29. CRM 2011 provides the ability to define and enforce required fields, forms and sections of forms at the Client's discretion. Field-level security can also be used to prevent access to specific fields on a form.
30. CRM 2011 is fully customizable with a limitation of approximately 1,000 fields per entity and runs on top of Microsoft SQL Server 2008 R2. Therefore, any limitations of user-defined fields are those set by the boundaries of SQL Server.
31. CRM 2011 supports entity-specific picklists and global picklists which can be easily managed by a system administrator. CRM 2011 also supports entity (table) lookups for cross-referencing values stored in other entities.
32. CRM 2011 allows field types, character limits and values to be set for all attributes.
33. CRM 2011 is fully customizable and allows for many descriptive fields per entity, such as multiple SSN's, Drives License Numbers and Account Numbers.
34. Auto-incrementing numbers could be automatically generated for fields, based on number schemes provided by the Client, to enforce distinctiveness between records.
35. CRM 2011 includes a custom workflow framework that can be customized to meet client needs, such as automatically closing a case based on business rules.
36. CRM 2011 offers the ability to validate and enforce business rules through the use of custom JavaScript, custom workflow and plugins; such as a case not being able to be closed without an associated disposition.
37. CRM 2011 integrates with the Microsoft Office suite and allows mail merges and reports to be created and generated. Custom workflows could be created to trigger system events when criteria are met, based on Client business rules.
38. CRM 2011 offers out of the box auditing functionality that tracks all changes, including: entity name, attribute name, date & time of the change, user who made the change, original value and new value. Audit data is controlled by security so that select individuals or groups can see the audit data.
39. CRM 2011 allows for all fields to be considered as a required field. This functionality can also be configured so that a field is required if other criteria have been met.

40. CRM 2011 allows for fields to be configured as required fields where data must be present in order to save a record.
41. CRM 2011 offers entity-specific picklists and global picklists, as well as lookups on related entities where system users could select one or more codes, depending on business requirements. All of the aforementioned options could be configured as a required field.
42. CRM 2011 offers the ability to create custom workflows that can send an email or other notifications to key system users when specified criteria have been met.
43. CRM 2011 offers the ability to create custom workflows that can send an email or other notifications to involved parties when specified criteria have been met.
44. Functionality could be created to flag key Client-defined name and case information. This could be accomplished through use of a picklist, checkbox, pop-up window, view or other methods.
45. CRM 2011 offers the ability to associate multiple related entity records to a single Contact (name) record. Duplicate detection functionality also exists which helps to ensure there is only one occurrence of a single contact in the system. The Contact record could be configured as a required field to enforce all contacts being associated with their respective records in relational entities.
46. CRM 2011 offers multiple address, phone & fax numbers and email addresses for each Contact. Additional fields could be created based on Client business rules, up to the field limit set on each entity.
47. Dates associated with address changes could be tracked using the CRM 2011 built-in auditing functionality, or custom date fields could be created to support changes in dates that do not coincide with the date they are actually entered into the CRM system.
48. CRM 2011 allows multiple contacts to be associated with multiple contacts through the use of a many-to-many relationship. A role (spouse, child, brother, sister, business associate) could be associated with each contact in the relationship.
49. The Contact (name) record could be configured to show all relationships throughout the system, including, but not limited to: aliases, cases, role in each case (client, defendant, victim), and charges.
50. A relational "Aliases" entity could be created and associated with each Contact record to allow for multiple alias records to be tracked for each Contact.
51. A relational "Charges" entity could be created and associated with each Contact record to allow for multiple charge records to be tracked for each Contact.
52. A 'rap sheet' could be created and generated as a custom CRM report, which would list all case involvements for any individual, along with the contact's role in the case (defendant, victim, witness)

53. CRM 2011 offers a Contact entity to track people and an Account entity to track businesses and group names, along with their associations to one another. Those entities could be customized to fulfill the MFCU business requirements, or a custom Name entity could be created to accommodate the names of all people, businesses and group names.
54. Comment fields could be utilized for each name record, whereby the system user can enter multiple lines of text. The default is 2,000 characters, but can be increased to suit MFCU business needs. CRM 2011 also offers Notes & Attachments functionality which allows multiple entries that are date and time stamped. Notes can also have files attached in formats such as, but not limited to: PDF, DOC, XLS, JPG.
55. A simple CRM 2011 view will accomplish this task.
56. CRM 2011 includes duplicate data detection out of the box.
57. CRM 2011 supports assigning records to individuals or groups of individuals.
58. CRM 2011 form designer will allow for this task.
59. CRM 2011 form designer will allow a custom field to store the case type.
60. CRM 2011 will allow these data elements to be related to cases.
61. CRM 2011 will allow users to reopen resolved cases.
62. CRM 2011 will allow 1 to many relationships for witnesses, victims, and any other agencies.
63. CRM 2011 will allow events linked to a case.
64. CRM 2011 will allow for creation of the necessary metadata for attorney and court information.
65. This can be accomplished with a custom control.
66. CRM 2011 includes built in activities and custom entities in order to handle all case events.
67. CRM 2011 will allow for custom relationships to accomplish this task.
68. This can be accomplished with custom relationships.
69. CRM 2011 can support charge counts with use of a plugin.
70. All 3 can be custom attributes.
71. This can be done by adding a disposition attribute to cases.
72. This can be done by adding a custom sentence entity to cases.
73. These items can be custom attributes on charges.
74. This can be handled by adding a custom entity to handle special conditions.
75. CRM 2011 can handle this with a web resource control.
76. You can relate cases by adding a parent entity.
77. This can be accomplished with a plugin.
78. This can be accomplished with a custom entity or entities to manage payment information.
79. CRM 2011 will allow for data reuse across the entire application.
80. CRM 2011 will allow for standard lookup values for reuse throughout the application.

81. This can be handled with a web resource and custom entities.
82. Microsoft Dynamics CRM offers the ability to quickly change or update a user's security role.  
This applies to not only entire system access, but also role based forms and field level security.
83. The user structure starts at a business unit level and then down to a team. A security role can be placed on both the team (group) and the individual user.
84. The files and attachment security is derived from the record in which the files and attachments belong too. Users will be assigned a certain role both limiting them to features they need access and blocking the items they don't.
85. This can be completed by configuring and using security roles.
86. Using retrieve plugins, it will be possible to configure the required access by specific type options and restrict access as needed.
87. A combination of Microsoft Dynamics CRM security and plugins will restrict access as required.
88. Microsoft Dynamics CRM is very granular and can support this need.
89. Microsoft Dynamics CRM contains very detailed record and user based auditing. It tracks and displays the user whom made the change, the old value, the new value, and when this change occurred.
90. For every record created in Microsoft Dynamics CRM, this information is tracked and audited.
91. 91- On Prem - Microsoft Dynamics CRM security is integrated with Active Directory and does not require a separate password to be entered.  
Online - Microsoft Dynamics CRM Online provides the ability to change your password.
92. Microsoft Dynamics CRM offers both ADHOC reporting and also embedded SSRS reporting.  
These reports can be ran against single records, or against a custom list or view of records.
93. Standard reports are present.
94. Report locations will not only be in a general report area, but also accessible for every entity that is involved with the reports transaction.
95. Microsoft Dynamics CRM uses a special query designer to allow users to design, build, save, and share their own reports and custom created views.
96.
  - a. This is a standard feature.
  - b. This can be done by using report scheduling and workflow.
  - c. Reports can be scheduled.
  - d. Microsoft Dynamics CRM provides advanced dashboarding and charting capabilities.
  - e. This is a standard feature in the report viewer control.
97. This can be done with either ADHOC reporting or by developing and adding custom SSRS reports.
98. The entire application will be accessed and configured to use SSL.

99. These features are standard functionality.
100. Automated or manual workflow process can complete this.
101. These options are included in both the ADHOC and SSRS report viewer controls.
102. Using appointments and activities, users will be able to add items to the CRM calendar and also schedule appointments via Microsoft Outlook.
103. Microsoft Dynamics CRM integrates with Microsoft Outlook and provides this functionality.
104. Microsoft Dynamics CRM provides detailed viewing, searching, and printing options for all data.
105. Microsoft Dynamics CRM data can be viewed within Microsoft Outlook in which outlook provides all the calendar capability's for viewing and scheduling.
106. By using a Mail Merge tool built by Planet Technologies, users will be able to create documents and packets without opening any other applications.
107. Users have the ability to create word documents and use selected CRM data within those documents.
108. These attachments can be uploaded to a record and accessible to all users that have the correct permissions.
109. CRM allows for attaching of documents to records. For additional features such as searching or indexing, you would use SharePoint integrated with CRM.
110. SharePoint uses Checkin/Checkout functions.
111. Both CRM and SharePoint can be customized to allow document scanning. Other 3<sup>rd</sup> party tools are available as well to enhance this.
112. Both CRM and SharePoint can be customized to allow redaction. Products from companies like KnowledgeLake work really well to enhance this.
113. Documents attached to CRM records typically follow that record, however customized interfaces would allow for moving/routing docs or by using SharePoint.
114. Any attribute on any record in CRM is searching, both by wildcards or advanced find.
115. CRM can be extended to a broader search via customizations or use of SharePoint search.
116. Range searches are supported by CRM and results can be easily exported to Excel or other formats.
117. Search results indicated total results and dashboards can be created to visually represent those result based on any attribute defined.
118. CRM follows Microsoft design guidelines for navigation and looks similar to Outlook and even integrates with Outlook making it easier to understand.

119. CRM accepts several common shortcuts such as Ctrl-S for saving a record. All shortcuts correspond to a mouse click on the screen.
120. CRM can be used with tabbed browsing and will open screen within those tabs in a single interface.
121. CRM will remember commonly used lookups and autocompletes.
122. CRM supports JavaScript customizations and custom hot keys or functions can get built in JS web resources.
123. Manual or Automatic are supported, Automatic is done through a plugin.
124. Planet has performed training for counties, states and state agencies.
125. Planet offers several training paths including end user training, train the trainer or admin training. We also provide webinars or pre-recorded training videos.
126. Planet offers several training paths including end user training, train the trainer or admin training. We also provide webinars or pre-recorded training videos.
127. Planet offers several training paths including end user training, train the trainer or admin training. We also provide webinars or pre-recorded training videos.
128. Microsoft CRM provides updates every 6-8 weeks at no charge. Planet offers support through several contract options.
129. Planet on most projects provide pre and post documentation.
130. Planet will be accommodating.
131. Planet will be accommodating.
132. Planet uses several web tools and remote tools for problem solving.

## Desirables

1. This will be provided.
2. Planet has done barcoding with CRM. Both creating and reading barcodes.
3. Planet has extended CRM to allow for scanning barcodes.
4. Planet has built a custom ID generator that can include barcodes.
5. Merging of records in CRM is supported.
6. A single click or enter will open a case.
7. Reports are integrated with every screen/view in CRM.

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8. All of these formats are supported and exportable to.
9. Reports built in CRM are interactive.
10. Calendaring is built into CRM.
11. Links to a case can be embedded into the document or the document automatically associated with a given case.
12. Advanced Find is available from any screen. Predefined views and quick searches are also available. Results are exportable to Excel.
13. CRM provides a "Drill-Around" search style so all related records can be searched and opened easily.
14. The Ribbon buttons and navigation in CRM change in context of what is shown on the screen.
15. Ctrl+S plus several other familiar functions are available on CRM forms.
16. Unclear of the requirement
17. WV has 3 environment already prepared for this purpose. Planet also provides environments for this as well.



## References

**Client: Pennsylvania Governor's Office**

Rosa Lara

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PA State Capital  
501 North 3<sup>rd</sup> Street  
Harrisburg, Pa. 17120

Developed a matter management system for the Pennsylvania Office of General Counsel (OGC) using Microsoft Dynamics CRM 2011. This application will be implemented within 32 agencies and accessed by 900 users. It is designed to assist attorneys and support staff in the organization and management of matters. A matter is simply a proceeding, project, or other legal office activity which includes judicial and administrative proceedings; contracts, leases, deeds, invoices, and other transactions; regulatory and legislative activities; legal opinions/advice; and general administrative matters as directed by OGC and agency chiefs counsel. In addition, it will integrate with Microsoft SharePoint 2010 to house over 36,000 legal documents related to matters.

This project was contracted through the PA Office of Administration although the application was being built for the Office of General Counsel.

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**Client: Howard County Government**

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410.313.3505

Planet, in conjunction, with Howard County, Maryland's County Executive's Office is implementing a Citizen Response Management Solution using Microsoft CRM V4.0. This system uses best practices by leveraging the built in functionality of case management and contact/constituent tracking. In addition customizations have been built that will integrate with Howard County's GIS deployment. For citizen's with street addresses in Howard County, this integration uses a custom web service to access the GIS database of all valid addresses in the County. Data entry of the address is thereby guaranteed to result in accurate data to be consumed by CRM. This result will determine who to assign the CRM record to (depending upon where they are located geographically within the county) and will also be able to feed the GIS reporting for analysis of where specific events are occurring.

[DN] Microsoft Dynamics CRM 4.0  
Implemented 9/2010

**Client: State of West Virginia**

Tammy Haynes  
1-304-558-6244 ext=255.  
[Tammy.L.Haynes@wv.gov](mailto:Tammy.L.Haynes@wv.gov)

Currently on Site at the State of West Virginia working through the Office of Information Technology (OIT) performing services for PEIA (Public Employees Insurance Agency).

Planet Technologies is serving as the CRM technical lead and functional consultant. Responsibilities include server maintenance, deploying client software patches to user desktops, fixing numerous bugs, integration and performance issues. Also responsible for consulting management staff on CRM best practices as well as training WV staff to take on CRM administration responsibilities and future CRM development.

Dynamics CRM 4.0

Work began 11/2011 and as of 7/2012 ongoing.

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Cost Sheet

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## RFQ HHR 12071 Cost Sheet

## Services:

• Project Management	\$ <u>120,400</u>
• Installation	\$ <u>11,200</u>
• Configuration	\$ <u>425,180</u>
• Hosted Setup	\$ <u>5,600</u>
• Onsite Assistance	\$ <u>11,200</u>
• Training	\$ <u>56,000</u>

Add-on Software, 3 <sup>rd</sup> Party Software	\$ 0 - *see note
Yearly Support and Subscription Fees	\$ 0 - *see note
Grand Total (For 1 <sup>st</sup> Year)	\$ <u>629,580</u>

Note: Bid will be awarded to the Vendor with the lowest total cost meeting the specifications.

Vendor Name: Planet Technologies

Vendor Address: 20400 Observation Drive Suite 204  
Germantown, Maryland 20876

Remit Address: Accounts Receivable  
20400 Observation Drive Suite 204  
Germantown, Maryland 20876

Fax Number: (301) 721-0189

Phone Number: (301) 721-0100

Email: AR@go-planet.com

Vendor Signature:  Date: July 24, 2012

\*WVA DHHR currently owns over 4,000 seats of Microsoft Dynamics CRM licenses. Planet recommends that as part of this project DHHR leverage these licenses that are already owned.

The CRM servers for DHHR are currently managed by West Virginia OIT and there may be a cost for this service that is unknown by Planet.

Should DHHR choose not to leverage these existing licenses and infrastructure and look to purchase Microsoft CRM Online, a per user per month fee will be required. The MSRP cost is \$44/user/month.

The following information is provided as an example to provide an understanding of the resources needed to conduct this project. This specific offering may need to be modified or may be added to in order to meet the needs of the business.

\*The above hours are estimates for the services and deliverables described in this document and should be taken as such. Work will only be performed based on the scope of work defined in this agreement. Any addition work request or changes in scope may be subject to changes in cost and schedule.

### Payment Terms

Client will be billed every 2 weeks on NET30 terms.

A valid and approved purchase order is also required in conjunction with this signed contract to commence work on this project. Once the terms have been processed Planet will start work within 30 days of execution.

Please make Purchase Orders to Planet Technologies, Inc.

### Travel Expenses

Travel expenses incurred as part of the services and deliverables outlined in this proposal are included in the above cost. However, any additional work or change in scope may require additional travel expenses.

### Prerequisites

The Customer will be required to take the following responsibilities:

- Arrange for suitable personnel to be available to furnish the necessary information.
- Appoint an individual to act as a single interface to Planet.
- Provide timely responses for information.
- Provide access to facilities as required.
- A working environment with necessary phone and network connections.

### Roles

Due to the timeframes set forth, Planet recommends a team of 1-3 individuals to lead the project. Some resources are capable of performing more than one role. The proposed team will be made up of:

Case Management Software July 25, 2012 Page 21 of 24		 Security Solutions Advanced Infrastructure Solutions Networking Infrastructure Solutions Information Worker Solutions
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**Planet / Microsoft Senior Consultant:** This individual will be a Subject Matter Expert (SME) on Email and Microsoft Technology and provide guidance and direction to the team based on lessons learned during other customer deployments. The Planet Senior Consultant will participate in a full-time capacity and lead the plan and milestones.

**Planet Project Manager:** A project manager will be made available part-time to provide leadership, direction, and management of this process. This will allow for all parties to have a single point of contact who can aggregate all information and maintain schedule.

## Conclusion

Planet Technologies looks forward to starting this project as soon as possible. Feel free to contact us with any questions or comments you may have. Please review the terms section and accept this proposal by signing below. Forward the signed copy to the address listed below.

Planet Technologies, Inc.  
20400 Observation Drive, Suite 204  
Germantown, MD 20876  
(301) 721-0100

Signature of this proposal signifies acceptance and agreement with all items listed above.

WV DHHR

Planet Technologies

Signature	Date	Signature	Date
_____	_____	_____	_____
Print Name	_____	Print Name	_____
Company Name	_____	Company Name	_____
Street Address	_____	Street Address	_____
City, State, Zip Code	_____	City, State, Zip Code	_____
_____	_____	_____	_____

## Required Contract Forms

Case Management Software  
July 25, 2012  
Page 24 of 24



**Microsoft**  
GOLD CERTIFIED  
*Partner*

Security Solutions  
Advanced Infrastructure Solutions  
Networking Infrastructure Solutions  
Information Worker Solutions



CERTIFICATION AND SIGNATURE PAGE

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By signing below, I certify that I have reviewed this Solicitation in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this bid or proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.



Planet Technologies

(Company)

Steven Winter, Vice-President

(Representative Name, Title)

301 721-0100 (phone) 301 721-0189 (fax)

(Contact Phone/Fax Number)

7/24/2012

(Date)

ADDENDUM ACKNOWLEDGEMENT FORM  
SOLICITATION NO.: HR12071

**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 type="checkbox"/> Addendum No. 2            | <input type="checkbox"/> Addendum No. 7  |
| <input 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.

Planet Technologies

Company

[Signature]

Authorized Signature

7/24/2012

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

AGREEMENT ADDENDUM FOR SOFTWARE

In the event of conflict between this addendum and the agreement, this addendum shall control:

1. **DISPUTES** - Any references in the agreement to arbitration or to the jurisdiction of any court are hereby deleted. Disputes arising out of the agreement shall be presented to the West Virginia Court of Claims.
2. **HOLD HARMLESS** - Any provision requiring the Agency to indemnify or hold harmless any party is hereby deleted in its entirety.
3. **GOVERNING LAW** - The agreement shall be governed by the laws of the State of West Virginia. This provision replaces any references to any other State's governing law.
4. **TAXES** - Provisions in the agreement requiring the Agency to pay taxes are deleted. As a State entity, the Agency is exempt from Federal, State, and local taxes and will not pay taxes for any Vendor including individuals, nor will the Agency file any tax returns or reports on behalf of Vendor or any other party.
5. **PAYMENT** - Any references to prepayment are deleted. *Fees for software licenses, subscriptions, or maintenance are payable annually in advance.* Payment for services will be in arrears.
6. **INTEREST** - Any provision for interest or charges on late payments is deleted. The Agency has no statutory authority to pay interest or late fees.
7. **NO WAIVER** - Any language in the agreement requiring the Agency to waive any rights, claims or defenses is hereby deleted.
8. **FISCAL YEAR FUNDING** - Service performed under the agreement may be continued in succeeding fiscal years for the term of the agreement, contingent upon funds being appropriated by the Legislature or otherwise being available for this service. In the event funds are not appropriated or otherwise available for this service, the agreement shall terminate without penalty on June 30. After that date, the agreement becomes of no effect and is null and void. However, the Agency agrees to use its best efforts to have the amounts contemplated under the agreement included in its budget. Non-appropriation or non-funding shall not be considered an event of default.
9. **STATUTE OF LIMITATION** - Any clauses limiting the time in which the Agency may bring suit against the Vendor, lessor, individual, or any other party are deleted.
10. **SIMILAR SERVICES** - Any provisions limiting the Agency's right to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are hereby deleted.
11. **FEES OR COSTS** - The Agency recognizes an obligation to pay attorney's fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void.
12. **ASSIGNMENT** - Notwithstanding any clause to the contrary, the Agency reserves the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the Vendor and Vendor shall obtain the written consent of Agency prior to assigning the agreement.
13. **LIMITATION OF LIABILITY** - The Agency, as a State entity, cannot agree to assume the potential liability of a Vendor. Accordingly, any provision limiting the Vendor's liability for direct damages to a certain dollar amount or to the amount of the agreement is hereby deleted. Limitations on special, incidental or consequential damages are acceptable. In addition, any limitation is null and void to the extent that it precludes any action for injury to persons or for damages to personal property.
14. **RIGHT TO TERMINATE** - Agency shall have the right to terminate the agreement upon thirty (30) days written notice to Vendor. Agency agrees to pay Vendor for services rendered or goods received prior to the effective date of termination. *In such event, Agency will not be entitled to a refund of any software license, subscription or maintenance fees paid.*
15. **TERMINATION CHARGES** - Any provision requiring the Agency to pay a fixed amount or liquidated damages upon termination of the agreement is hereby deleted. The Agency may only agree to reimburse a Vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by the Agency prior to the end of any current agreement term.
16. **RENEWAL** - Any reference to automatic renewal is deleted. The agreement may be renewed only upon mutual written agreement of the parties.
17. **INSURANCE** - Any provision requiring the Agency to purchase insurance for Vendor's property is deleted. The State of West Virginia is insured through the Board of Risk and Insurance Management, and will provide a certificate of property insurance upon request.
18. **RIGHT TO NOTICE** - Any provision for repossession of equipment without notice is hereby deleted. However, the Agency does recognize a right of repossession with notice.
19. **ACCELERATION** - Any reference to acceleration of payments in the event of default or non-funding is hereby deleted.
20. **CONFIDENTIALITY** - Any provision regarding confidentiality of the terms and conditions of the agreement is hereby deleted. State contracts are public records under the West Virginia Freedom of Information Act.
21. **AMENDMENTS** - All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by both parties. No amendment, modification, alteration or change may be made to this addendum without the express written approval of the Purchasing Division and the Attorney General.

ACCEPTED BY:

STATE OF WEST VIRGINIA

VENDOR

Spending Unit: \_\_\_\_\_

Company Name: Planet Technologies

Signed: \_\_\_\_\_

Signed: [Signature]

Title: \_\_\_\_\_

Title: Vice President

Date: \_\_\_\_\_

Date: July 24, 2012

STATE OF WEST VIRGINIA  
Purchasing Division

0035

# 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 owed 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 SIGNATURE**

Vendor's Name: Planet Technologies

Authorized Signature: [Signature] Date: July 24, 2012

State of Maryland

County of Montgomery, to-wit:

Taken, subscribed, and sworn to before me this 24 day of July, 2012.

My Commission expires Mary F. Tucker, 20    .

**Mary F. Tucker**  
**NOTARY PUBLIC**  
**Montgomery County, Maryland**  
**My Commission Expires 8/21/2014**

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]



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

**Solicitation**

NUMBER
HHR12071

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

RFQ COPY  
 TYPE NAME/ADDRESS HERE

VENDOR

SHIP TO

HEALTH AND HUMAN RESOURCES  
 OFFICE OF INSPECTOR GENERAL  
 MEDICAID FRAUD CONTROL UNIT  
 408 LEON SULLIVAN WAY  
 CHARLESTON, WV  
 25301 304-558-2055

DATE PRINTED
07/17/2012

BID OPENING DATE: 07/25/2012 BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				1. QUESTIONS AND ANSWERS ARE ATTACHED. 2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.		
				END OF ADDENDUM NO. 1		
0001	1	JB		099-00-01-001		
				NEW CASE MANAGEMENT SOFTWARE, PER ATTACHED SPECS.		

SIGNATURE	TELEPHONE 304 721-0100	DATE 7/24/12
TITLE Vice President	FEIN 52-206 2407	ADDRESS CHANGES TO BE NOTED ABOVE

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



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

**Solicitation**

NUMBER
HHR12071

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1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

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HEALTH AND HUMAN RESOURCES  
 OFFICE OF INSPECTOR GENERAL  
 MEDICAID FRAUD CONTROL UNIT  
 408 LEON SULLIVAN WAY  
 CHARLESTON, WV  
 25301 304-558-2055

DATE PRINTED
06/21/2012

BID OPENING DATE: 07/25/2012 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB		099-00-01-001		
<p>THE STATE OF WEST VIRGINIA AND ITS AGENCY THE DEPARTMENT OF HEALTH AND HUMAN RESOURCES (DHHR), OFFICE OF INSPECTOR GENERAL, MEDICAID FRAUD UNIT REQUEST A QUOTE TO PROVIDE, INSTALL AND IMPLEMENT A NEW CASE MANAGEMENT SYSTEM PER THE ATTACHED SPECIFICATIONS.</p> <p>BID OPENING: JULY 25, 2012 AT 1:30 PM</p> <p>LOCATION: PURCHASING DIVISION, BUILDING #15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305</p> <p>SEE ATTACHED INSTRUCTIONS TO BIDDERS.</p> <p>NEW CASE MANAGEMENT SOFTWARE, PER ATTACHED SPECS.</p> <p>CASE MANAGEMENT SOFTWARE, INSTALLATION &amp; IMPLEMENTATION PER THE ATTACHED SPECIFICATIONS.</p>						

SIGNATURE <i>Alan W...</i>	TELEPHONE 301 721-0100	DATE July 24, 2012
TITLE Vice-President	FEIN 52-2062401	ADDRESS CHANGES TO BE NOTED ABOVE

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



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

**Solicitation**

NUMBER
HHR12071

PAGE
2

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

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HEALTH AND HUMAN RESOURCES  
 OFFICE OF INSPECTOR GENERAL  
 MEDICAID FRAUD CONTROL UNIT  
 408 LEON SULLIVAN WAY  
 CHARLESTON, WV  
 25301 304-558-2055

DATE PRINTED
06/21/2012

BID OPENING DATE:

07/25/2012

BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
***** THIS IS THE END OF RFQ HHR12071 ***** TOTAL:						

SIGNATURE <i>[Signature]</i>	TELEPHONE 304 721-0100	DATE July 24, 2012
TITLE Vice-President	FEIN 52 206240	ADDRESS CHANGES TO BE NOTED ABOVE

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



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

**Solicitation**

NUMBER
HHR12071

PAGE
2

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

VENDOR

RFQ COPY  
 TYPE NAME/ADDRESS HERE

SHIP TO

HEALTH AND HUMAN RESOURCES  
 OFFICE OF INSPECTOR GENERAL  
 MEDICAID FRAUD CONTROL UNIT  
 408 LEON SULLIVAN WAY  
 CHARLESTON, WV  
 25301 304-558-2055

DATE PRINTED
07/17/2012

BID OPENING DATE: 07/25/2012

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
***** THIS IS THE END OF RFQ HHR12071 ***** TOTAL:						629,580.00

SIGNATURE <i>[Signature]</i>	TELEPHONE 304 721-0100	DATE 7-24-12
TITLE Vice President	FEIN 522062401	ADDRESS CHANGES TO BE NOTED ABOVE

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