

## Contact Us

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

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**www.vxsystems.com**

02/26/14 09:50:17AM  
West Virginia Purchasing Division



VX Systems Inc.

Bid  
RFQ. NO.: BOM140018

Prepared for

**West Virginia Board of Medicine**

February 23, 2014

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## I. Statement of Understanding of Project

The West Virginia Board Medicine (WVBOM) is responsible for licensing allopathic physicians, podiatrists, medical corporations, medical Professional Limited liability Corporations and drug dispensing permits/certifications. WVBOM is responsible for verifying the appropriate education and necessary training for each field of study and granting of licensure. This is based upon the review of all qualifications mandated by the Medical Practice Act and determination that the individual or entity meets those qualifications. WVBOM is also responsible for the investigation, censuring of the individuals and entities it licenses for public safety as a whole.

WVBOM seeks a technology solution to better facilitate this mission.

VX Systems believes that compelling opportunities exist to assist WVBOM to enhance the efficiency of its operations. These same technologies will also position WVBOM to enhance its data quality and expand its service constituencies.

West Virginia Board of Medicine seeks a cloud based solution to better perform business operations for the state of West Virginia and to effectively use fiscal, human, and technical resources.

To this end, VX Systems proposes the EDGE software suite:

- Integrates existing and proven technologies such as Microsoft Office, SQL Server, Drupal CMS and customized components into an e-licensing software solution capable of supporting licensing, enforcement and revenue functions comprising daily operations of the agency and needs of the public.
- Create the channels for data sharing between the regulatory agencies through a secure web service layer.
- Increase measurable efficiencies relative to licensing, renewals and investigations departments.
- Fully integrated document management/knowledge management system.
- Web services for online renewals, online forms, licensee status updates and e-commerce/electronic revenue through West Virginia's "E-Gov" system.
- Seek data relationships with other agencies to improve quality of data and speed of service. Interface with FSMB's Uniform Application (UA) to automate a majority portion of daily data entry.
- Use various automation technologies wherever possible (ie address deliverability check; phone number/area code/exchange check; e-mail address verification, etc.)

These initiatives/features are instrumental for the long-term goal of improving client relations and services by streamlining functions and/or services offered. Our goal is that increased efficiencies will be supplemented by fully realized potential for revenue through cost reduction and more automated recordation processes.



## II. Corporate Qualifications

### ***Solutions Tailored to Medical and Healthcare Regulatory Organizations***

VX Systems Inc. is dedicated to providing technology solutions to the healthcare and regulatory sector. VX Systems Inc. is a consulting and software development house that specializes in the software business of medical licensing, and credentialing. VX Systems has developed all facets of business-specific and custom-designed software for medical practice regulation organizations including the Federation of State Medical Boards for more than fifteen years of both internal and public systems.

### ***Company Background***

Since being founded in 1993, VX Systems Inc. has provided software consulting services to a gamut of blue chip companies and mid-size firms alike. VX Systems was created with one focus: to assemble highly efficient teams of developers to architect, design, and develop exacting vertical market software. Our careful planning of architecture and attention to customer requirements enhances the stability of our systems today and allows for an open and flexible platform that can change with future requirements. Our systems are designed to be nimble and agile to better suit the needs of your organization.

VX Systems consultants are experienced in both development and support, with accreditations and certifications including Microsoft Certified System Development, Microsoft Operating Systems, Network Design, Enterprise Architecture, Design Patterns, and Unix Administration. Consultants are constantly learning and improving their skill sets to best serve clients, their IT development and missions. VX Systems Inc. consultants have a minimum of 17 years experience, ranging all the way up to 33 years. VX Systems is made of a core six principals and varying number of field consultants depending on number of current projects.

VX Systems is a known entity in the state medical board sector. It participated in the initial development of Texas' Federation of State Medical Boards' systems. Over the course of its 10-year relationship, VX Systems has unparalleled ground floor knowledge and experience with FSMB's systems. We have worked with a number of state boards in augmenting their current systems and assisted in data partnerships connecting these agencies. This knowledge about the medical and health care regulatory sector places VX Systems in a particularly well suited position to offer its expertise to individual boards.

In a demonstration of this unique position, VX Systems worked with the Center of Innovation at the National Board of Medical Examiners (NBME), the Federation of State Medical Boards (FSMB) and a number of state medical boards (New Hampshire, Ohio,

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and Kentucky) to create a pilot program called Trusted Agent (<http://www.trustedagent.org/>). Trusted Agent is now known as Uniform Application. Our latest achievement has been working with the Louisiana State Board of Medical Examiners to update their web presence and offerings under [www.lsbme.la.gov](http://www.lsbme.la.gov) implementing our Drupal solution for licensees, the general public and internal staff.

VX Systems has implemented EDGE for the South Dakota Medical Board replacing their web presence ([www.sdbmoe.gov](http://www.sdbmoe.gov)) and all internal systems which helped complete the separation from the Medical Association.

For more information and case studies, please visit our web site at <http://www.vxsystems.com>.

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### **III. Schedule**

Detailed schedule to be determined after Enterprise-Level Analysis (see deliverables).  
At current scope, projected effort from project inception will be done within the 150 day timeline set forth by the Board.

## IV. Deliverables

### Introduction

Deliverables include a list of several information technology initiatives that would benefit WVBOM. Elements described herein this document and others included with the RFQ #BOM140018, meet or exceed the general and performance requirements outlined in sections 3 and 4 of the Licensure Management Database System and Software Services document.

These initiatives can be summarized as follows:

1. Enterprise-level analysis
2. Legacy conversion into EDGE data model
3. CMS – public website Drupal installation on redundant virtual machine
4. EDGE installation/configuration on redundant virtual machine
  - a. Core system
  - b. Reporter –reports server
  - c. Web services configuration (i.e. E-Gov and UA)
  - d. Associate – Document management
  - e. Communicator – Correspondence management

### ***Assessment Goals and Methodology***

#### **Conceptual Overview**

The EDGE software deployment and implementation process directly impacts the quality and success of your projects. A team might employ adequate tools, resources and personnel, but still miss the mark if it is not using the best process for the situation. It is important to harmonize the team and Board needs with a process that optimizes its productivity. By using a proven methodology and sharing a single comprehensive process, the team and Board will be able to communicate more effectively and work more efficiently. It is important to use a proven iterative methodology that spans initial project conception to solutions implementation and support. Every board is different.

One flexible project management method recognizes that the Unified Process approach, customized for the particular technical needs of the project, produces consistent success and is the easiest to replicate across entities. This approach starts with the end clearly understood and foremost in mind, and provides consistent communication across the project life cycle.

There are formalized project stages that represent successful approaches. A typical project deployment life cycle includes phases for:

- Assessment
- Analysis
- Rules Design (The Boards specific business rules)
- Implementation/Testing
- Training

- 
- Finalization (Closure)
  - Support

## ***Enterprise-Level Analysis***

### **Overview**

To define what configuration/customizations is needed in the system, VX Systems must perform a high-level, but in-depth analysis of how WVBOM's 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.

### **Artifacts**

- Analysis Document

## ***Legacy Conversion/Data Model***

### **Overview**

The current data in the MS Access database will be extracted and analyzed both by our database personnel and personnel at the board. This data would then be mapped into a new data model that captures the licensing and investigations systems.

### **Artifacts**

- Data conversion map
- SQL Server scripts for conversion

## ***EDGE System Installation***

### **Overview**

The internal and external portions of the software will be configured to fit the board's requirements. These will be installed in the cloud based server solution.

Features of this system will include:

- Initial Licensing
- Licensing Renewal
- Investigations
- Fee Processing
- Integration with Document Management (Associate)

- Integration with Correspondence Management (Communicator)
- Producing printed documents (cards/certificates)

## ***CMS - Public Website***

### **Overview**

VX Systems can improve WVBOM's online presence by installing the Content Management system, Drupal. Drupal is an accepted standard in local, state and federal government agencies. Exact design details will be explored in the initial meeting.

## ***Reporter - Dynamic Reports Server***

### **Overview**

SQL Server Reporting provides the following benefits:

- Creating a centralized reports repository which would be accessible from the applications, the internal website, or from a composite view in a SharePoint-enabled system
- Ad-Hoc reports can be added or changed in the system easily
- Reports could be generated on demand or by timed/triggered events (i.e. close of month, or reconciliation reports)
- Easily facilitates data mining.
- Reports can be created and edited by end-users. WVBOM personnel would be able to maintain reports and extend reporting capabilities in the future without assistance.

## ***Web Services –EDGE Connect***

### **Overview**

Web services allow for machine to machine communication. Using a secure and encrypted path, a Board can trade data back and forth with data-sharing partners seamlessly and without human intervention.

- Allows for automatic population into WVBOM's system when data is available
- Streamlining internal services, such as eCommerce, emailing, document generation and retrieval
- Transmittal of data to and from FSMB's variety of services

- Sharing data with other regulatory agencies

## ***Associate - Document Management***

### **Overview**

During the analysis phase, the type of documents would be enumerated, the processing work flow would be defined, and database aspects would be explored, including capacity and frequency.

## ***Communicator - Correspondence Management***

### **Overview**

Communicator allows for the tracking of incoming mail, email and phone calls to the Board. History is automatically generated so that it can be reviewed on subsequent contact from an individual to the Board.

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### **Copyrights and Disclaimer**

This document and the material contained herein are the sole property of VX Systems Inc. This document, and any accompanying attachments, are given to VX Systems clients for their private use and are intended to assist those clients with project definition and for the presentation of possible solutions. This document is intended for presentation in its original and complete form and is not to be modified by entities other than VX Systems.

The material contained in this proposal represents proprietary, confidential information pertaining to VX Systems' methods and solutions. By accepting this proposal, the West Virginia Board of Medicine (WVBOM) hereby agrees the information contained herein shall not be disclosed outside of WVBOM and shall not be duplicated, used, or distributed for any purpose other than consideration for the proposal presented.





## Costs on project for WVBOM

Item			
<b>Software License<sup>1</sup> (up to 25 seats)</b>			
EDGE:Director Version 2.0, Web, Connect, Reporter	\$	50,000	
EDGE:Associate (Document Management)	\$	7,000	
EDGE:Locator, Communicator, Services	\$	7,000	
	Total Licenses	\$	64,000.00
<b>Professional Services and Implementation</b>			
Content Management System - Public Web Site	\$	15,000	
Data Conversion	\$	10,000	
Installation/Conversion to EDGE Components	\$	12,000	
2 Site Visits (Initial and Deploy/Training)	\$	10,000	
	Total Services	\$	47,000.00
Yearly Maintenance Subscription <sup>2</sup> Cost \$42,000			
Additional Professional Services Support Cost (\$130 Hour)			
	<b>Total</b>	<b>\$</b>	<b>111,000.00</b>

<sup>1</sup>-Hosted Environment – Windows: Included 2 VPS (external/Internal) Windows server licenses, SQL Server

<sup>2</sup>- Costs for subscription includes Hosting with Virtual Private Servers (Private Cloud), System Maintenance, User Support.

## Cost Schedule

Item	Cost Year 1	Year 2	Year 3	Tentative Due Date
Analysis/Initial configuration - 1st Site Visit	\$ 5,000	\$ -	\$ -	Upon contract start
Installation/Conversion/Customizing	\$ 47,000	\$ -	\$ -	(billed as work performed)
<b>MILESTONE 1</b> - Content Management System Delivery	\$ 15,000	\$ -	\$ -	3-4th Month
<b>MILESTONE 2</b> - on delivery of new Licensing System (EDGE:Web, EDGE:Director, EDGE:Connect, EDGE:Reporter)	\$ 25,000	\$ -	\$ -	5-6th Month
Training / Finalization (Site Visit 2)	\$ 5,000			6th Month
<b>MILESTONE 3</b> - on delivery of EDGE:Associate, EDGE:Locator, Communicator, any other remaining items	\$ 14,000	\$ -	\$ -	6th Month
Initial Year Support/Customization	\$ -	\$ 42,000		
Yearly Maintenance Subscription (Support and scheduled updates)	\$ -		\$42,000	12 monthly payments of \$3500
<b>Total</b>	<b>\$ 111,000</b>			

REQUEST FOR QUOTATION #BOM140018  
Licensure Management Database System and Software Services

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10. MISCELLANEOUS:

- a. **Contract Manager:** During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

**Contract Manager:** DAWIUS SAWAF  
**Telephone Number:** 214 476 7980  
**Fax Number:** \_\_\_\_\_  
**Email Address:** DSAWAF@VXSYSTEMS.COM


**Software Attachment**

Attachment

PO#:

This agreement constitutes the entire agreement between the parties, and there are no other terms and conditions applicable to the licenses granted hereunder.

Agreed

 02/25/2014  
Signature Date

\_\_\_\_\_  
Signature Date

VP  
Title

\_\_\_\_\_  
Title

VK SYSTEMS Inc  
Company Name

\_\_\_\_\_  
Agency/Division

WV-96A  
Rev. 12/12

**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 in the agreement limiting the Vendor's liability for direct damages is hereby deleted. Vendor's liability under the agreement shall not exceed three times the total value of the agreement. 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: VX SYSTEMS INC

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

Signed: [Signature]

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

Title: VP

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

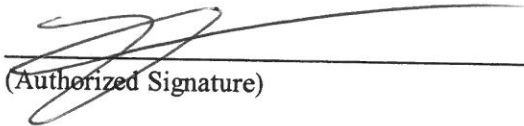
Date: 02/25/2014

**CERTIFICATION AND SIGNATURE PAGE**

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.

IX SYSTEMS Inc

(Company)



(Authorized Signature)

DARIN SAWAF VP

(Representative Name, Title)

214 476 7980

(Phone Number)

(Fax Number)

02/25/2014

(Date)

RFQ No. ROM 14 0018

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

**MANDATE:** Under W. Va. Code §5A-3-10a, 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: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. 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.

**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.

**"Employer default"** means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

**"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.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: VX SYSTEMS INC

Authorized Signature: \_\_\_\_\_ Date: 02/25/2014

State of Tx

County of Cappell, to-wit:

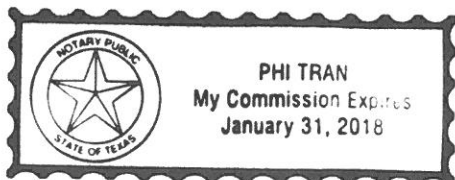
Taken, subscribed, and sworn to before me this 25 day of February, 2014.

My Commission expires January 31, 2018.

**AFFIX SEAL HERE**

**NOTARY PUBLIC** \_\_\_\_\_

*Purchasing Affidavit (Revised 07/01/2012)*



**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: BOM140018**

**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 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.

UX SYSTEMS Inc  
 Company

[Signature]  
 Authorized Signature

02/05/2014  
 Date

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



# EDGE

Enterprise system for regulatory agencies

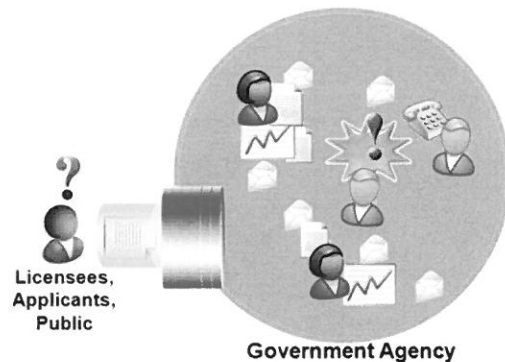
## Medical Board Edition

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.

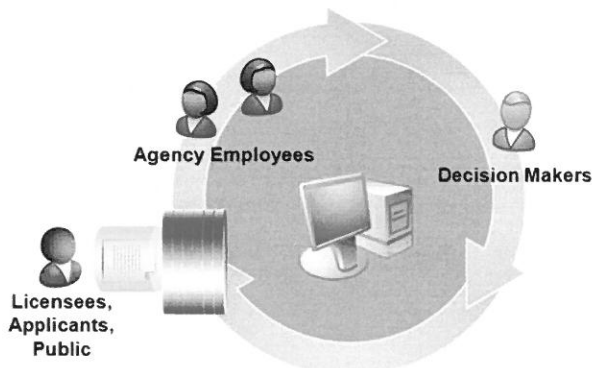
## Government agencies struggle with maintaining a structured, streamlined process

### 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



## What can EDGE do for me?

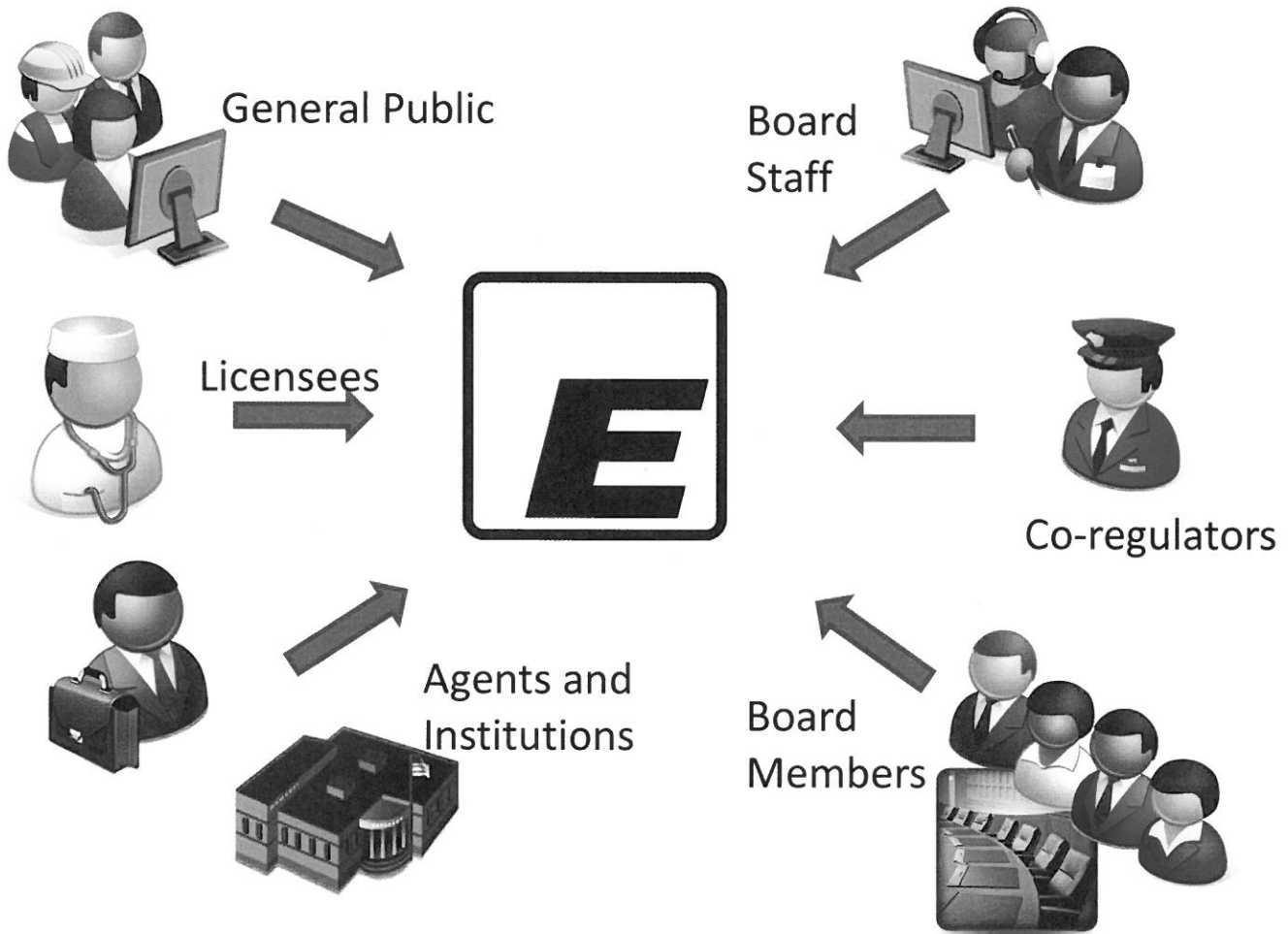
EDGE is a software suite comprised of internal and external web products and services.

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

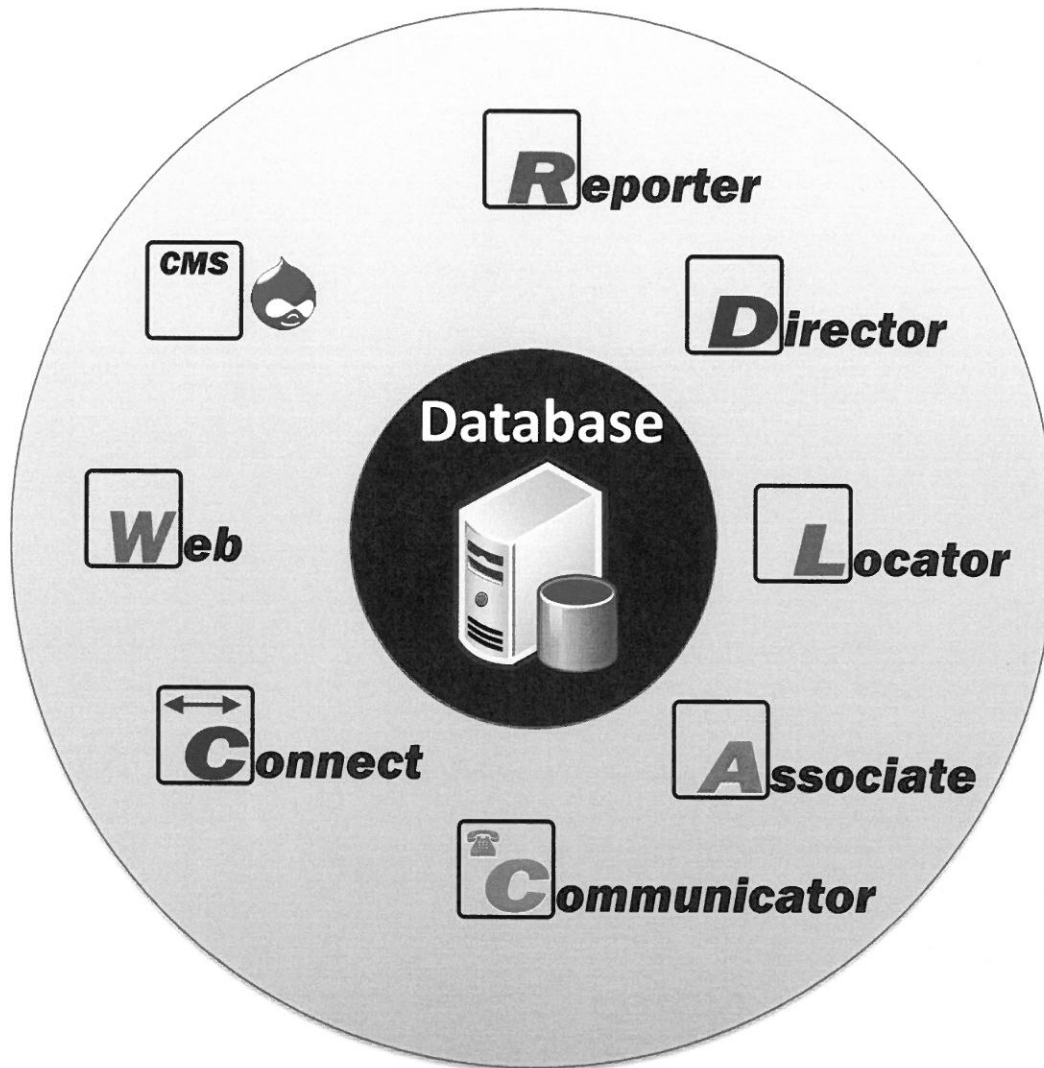
To applicants and licensees, the software provides a secure and private area to submit forms, change their information and check on the status of their applications.









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 your own state's custom payment gateway ).

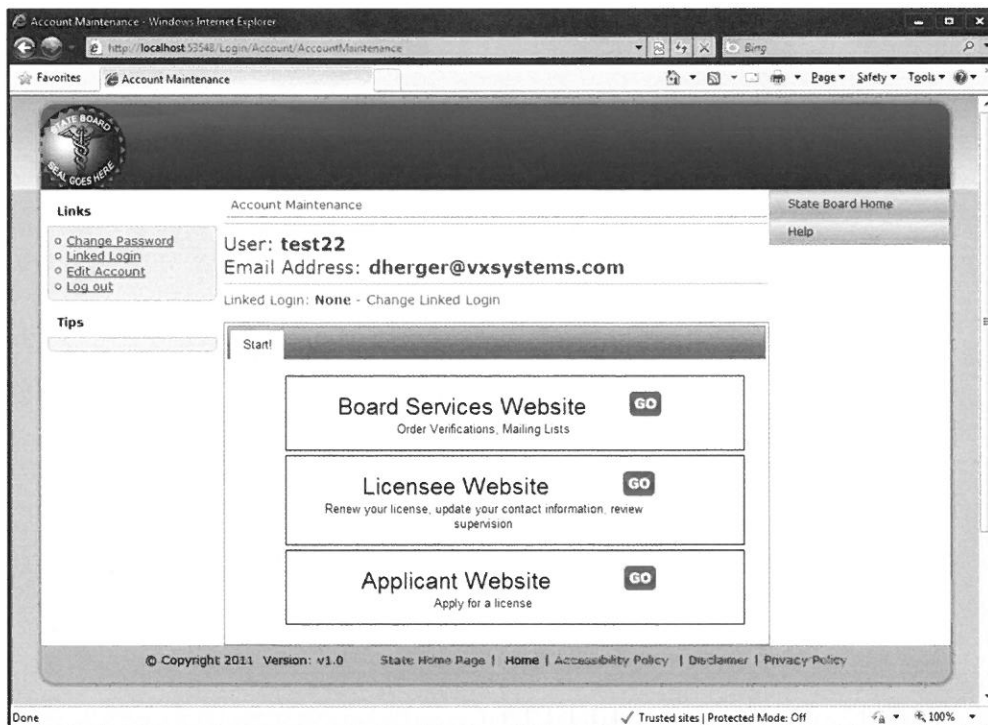
For the general public, online verifications can provide as much, or as little detail, as configured. Disciplinary actions taken by a Board can also be posted to a web log (blog) that supports RSS news feeds. These actions can be searched by name and date range as well.

## 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.

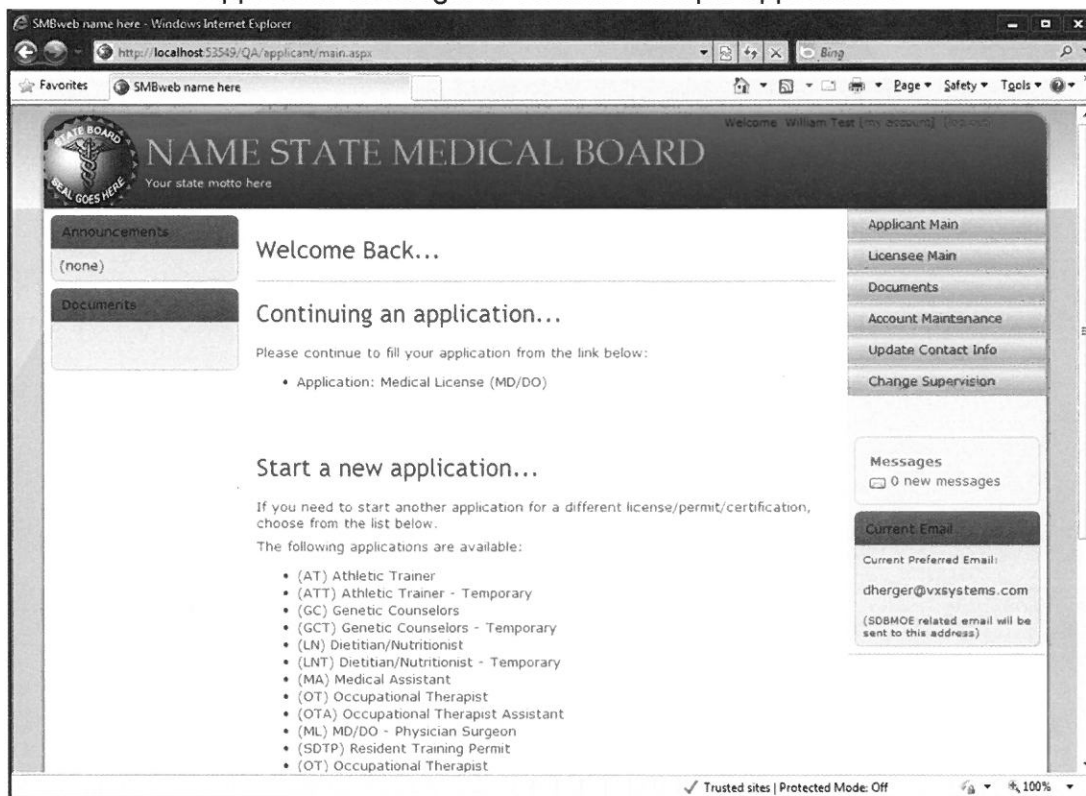


User accounts can have a variety of services available to them:



## 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.

The screenshot shows a web browser window with the URL `http://localhost:53549/QA/applicant/applRelease.aspx?cdfi=118068`. The page header includes the logo for the 'STATE BOARD' and the text 'NAME STATE MEDICAL BOARD' with the motto 'Your state motto here'. A 'Welcome William Test [my account] [log out]' message is visible in the top right.

The main content area is titled 'Affidavit And Authorization For Release of Information'. It contains the following text:
 

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.

Below this is the section 'Sending to the Board:'.

On the right side, there is a 'Progress' section with the status 'Not Submitted' and a checklist:
 

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

An inset window shows a document form with the following text:
 

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.

Fields for:
 

- 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

A box labeled 'Applicant Photograph' contains the instruction: 'Securely tape or glue in this square a current front-view 2" x 2" passport-type color photograph of yourself.'

The notary section includes:
 

NOTARY

Dated \_\_\_\_\_ Signed \_\_\_\_\_

State of \_\_\_\_\_ County of \_\_\_\_\_

SUBSCRIBED AND SWORN TO before me this \_\_\_\_\_ day of, \_\_\_\_\_ 20\_\_\_\_.

My commission expires \_\_\_\_\_ (NOTARY PUBLIC SIGNATURE & SEAL)

At the bottom of the document is a barcode with the alphanumeric string 'D0C 3 1 3 A 5 1' above it.

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



### Medical School info

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

Add a new entry:

School Name:

City:

State Or Province:

Country:

Date Start:

Date End:

Degree Or Specialty:

Graduation Status:

Grad Date / Anticipated Grad Date:

Please correct the following  
 > Status is required



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

SMBweb name here - Windows Internet Explorer  
 http://localhost:53549/QA/applicant/main.aspx

NAME STATE MEDICAL BOARD  
 Your state motto here

Welcome Ralph Example (my account) Logout

Announcements  
 (none)

Documents

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

Messages  
 0 new messages

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

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.

Trusted sites | Protected Mode: Off

SMBweb name here - Windows Internet Explorer  
 http://localhost:53549/QA/applicant/main.aspx

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

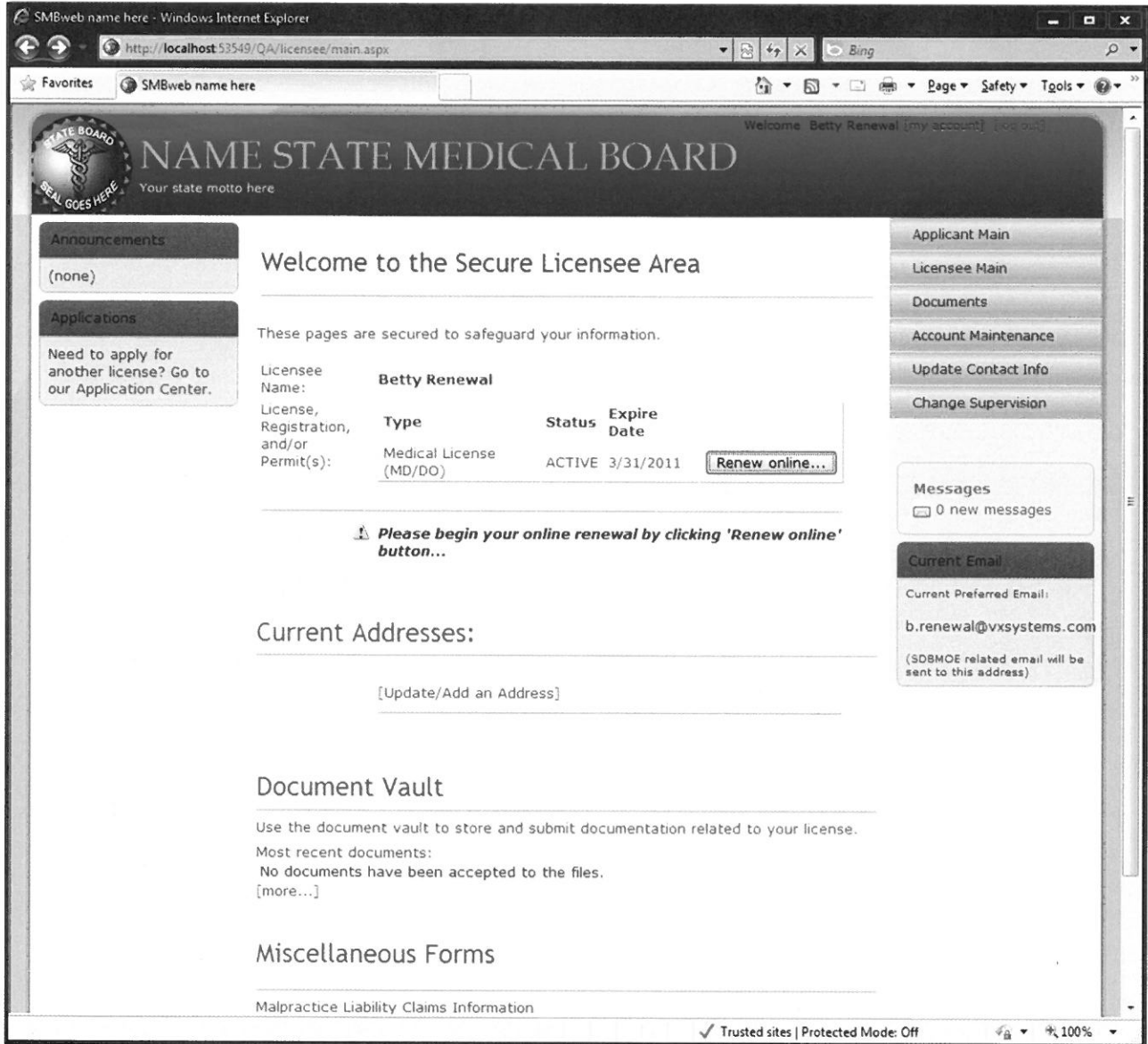
Current Preferred Email:  
 r.example@vxsystems.com  
 (SDBMOE related email will be sent to this address)

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.



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

Welcome Betty Renewal [my account] [log out]

**NAME STATE MEDICAL BOARD**  
 Your state motto here

Announcements  
 (none)

Applications  
 Need to apply for another license? Go to our Application Center.

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

### Welcome to the Secure Licensee Area

These pages are secured to safeguard your information.

Licensee Name:	<b>Betty Renewal</b>		
License, Registration, and/or Permit(s):	Type	Status	Expire Date
	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

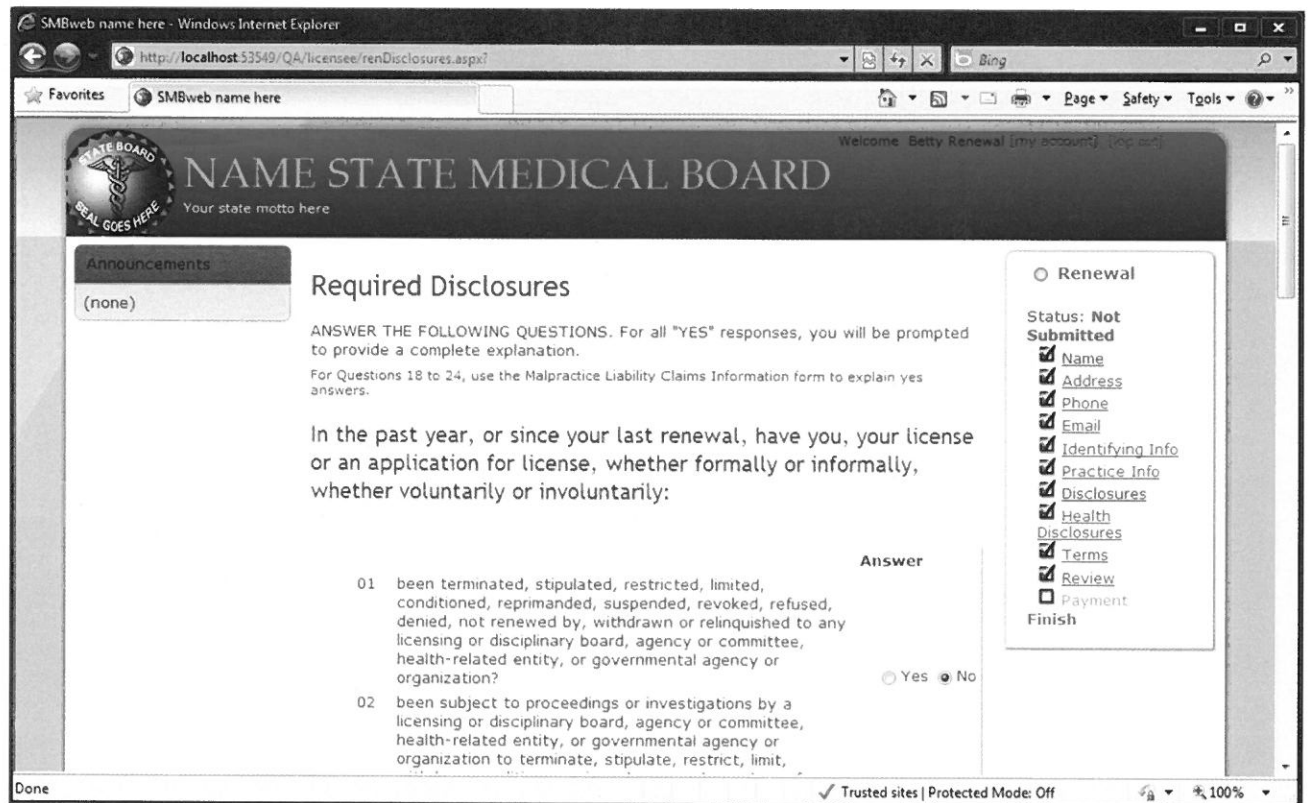
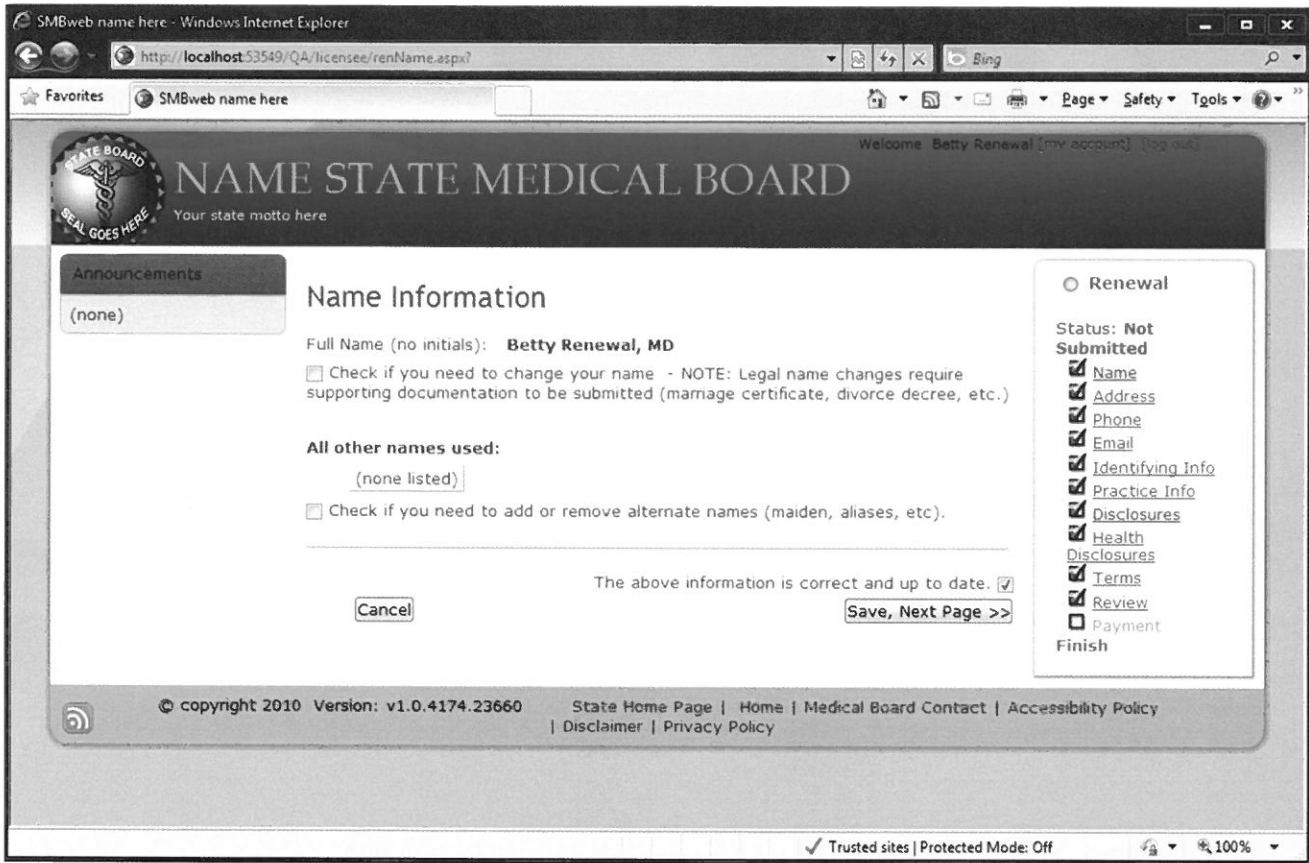
Malpractice Liability Claims Information

Messages  
 0 new messages

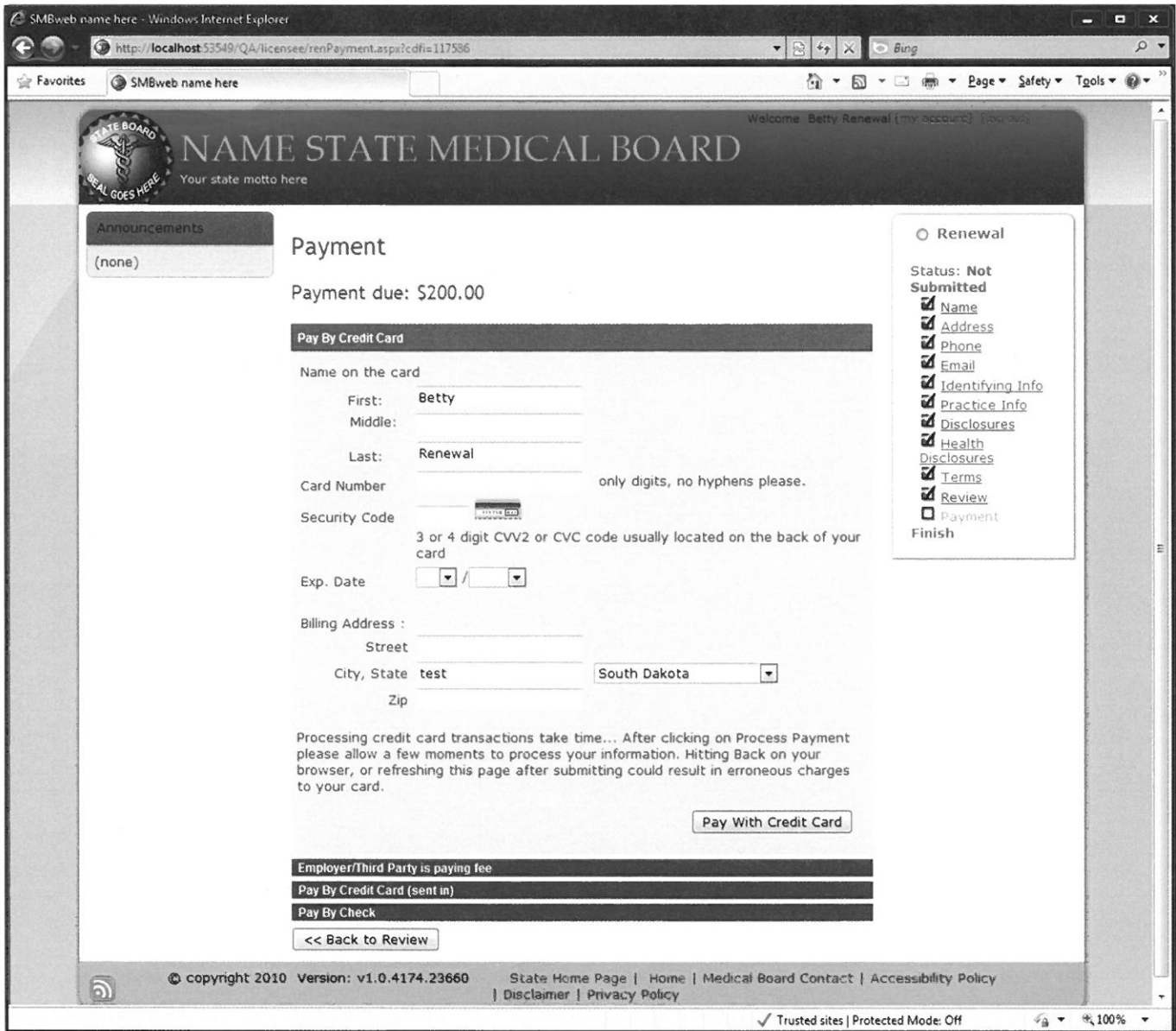
Current Email  
 Current Preferred Email:  
 b.renewal@vxsystems.com  
 (SDBMOE related email will be sent to this address)

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:



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?cdfa=117586

NAME STATE MEDICAL BOARD  
 Your state motto here

Announcements  
 (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

© copyright 2010 Version: v1.0.4174.23660  
 State Home Page | Home | Medical Board Contact | Accessibility Policy  
 | Disclaimer | Privacy Policy

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 SQL Reporting Services, 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
- Enforcement and disciplinary tracking
- Automated notifications
- Health care-specific identifiers
- Health care-specific education and training tracking



# Contact/License Management

## Heuristic Search

The screenshot shows the Director web application interface. The top navigation bar includes Home, Contacts, Licensure, Verifications, Enforcement, Documents, Board Services, Help, and Administration. The main content area features a 'Contact Search' form with fields for License Number, Business Name, First Name, Last Name, City, State, and County. Below the form is a 'Results:' section displaying a table of search results.

**Contact Search Form:**

- License Number:
- OR
- Business Name:
- First Name:
- Last Name:  Example
- City:  State:  ZIP:
- County:
- Buttons: 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

**Recent:**

- [Kevin M. Example, PA](#)
- [Jerome A. Eckrich, Jr., MD](#)
- [Lawrence P. Example, PA](#)
- [Mike Example](#)

# 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

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

**CONTACT - OVERVIEW**

**RECENT WORK TASKS**

Start Date	Type	Status	Finalized Date
5/12/2011	Concern Review	New	<a href="#">details</a>
1/27/2011	Applicant Process	Submitted to Initial Review	<a href="#">details</a>
1/27/2011	Fee Processing	Unpaid	<a href="#">details</a>

**CONCERNS** [\[more\]](#)

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

**FOLDERS:**

Folder ID	Type	Date
117339	Concern	<a href="#">details</a> 5/11/2011 12:00:00 AM
117281	License Application	<a href="#">details</a> 1/27/2011 9:21:56 PM

**JOURNAL** [\[add\]](#)

Entry Date	Type	Author	
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

© copyright 2011 VX Systems, Inc Version: v1.0.4175.25385 [Home](#) | [Sitemap](#) | [RSS Feed](#)

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

Director  
 EDGE - State Medical Board Edition

by Name Search

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

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

**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

**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:

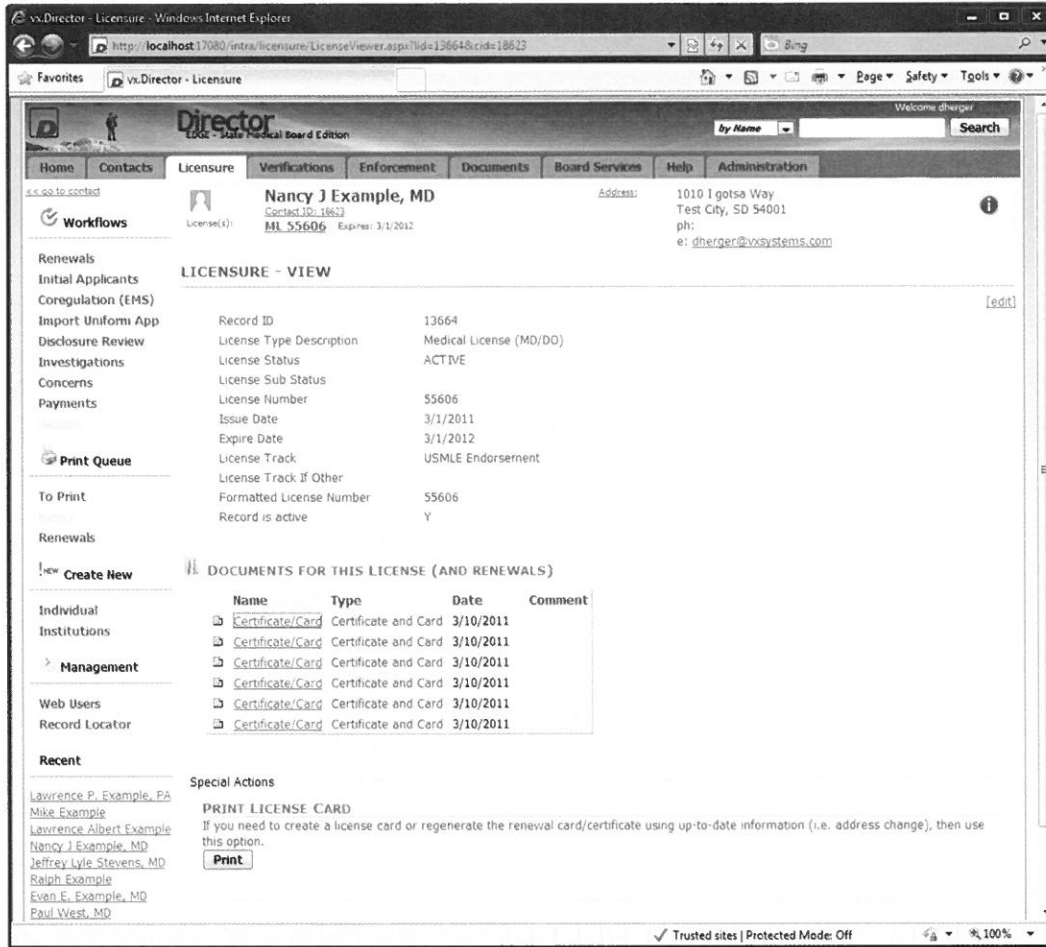
Certificate Number: **555555**  
 Certification Date: **Feb 1995**  
 Recertification Date: **Feb 2005**  
 Expire Date: **Jan 2015**  
 or Lifetime Certification: **No**

Verified: **Yes**  
 Accepted By User: **dherger**  
 Accepted By Date: **6/1/2011**

**Save** **Cancel**

Trusted sites | Protected Mode: Off 100%

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



The screenshot shows the 'Licensure - View' page in the Director web application. The page displays details for a license held by Nancy J Example, MD. The license number is ML 55606, and it expires on 3/1/2012. The license is currently active. The page also shows a list of documents for this license, all of which are 'Certificate/Card' documents issued on 3/10/2011. A 'Print License Card' option is available, with a warning that it will create a license without regard to the application process.

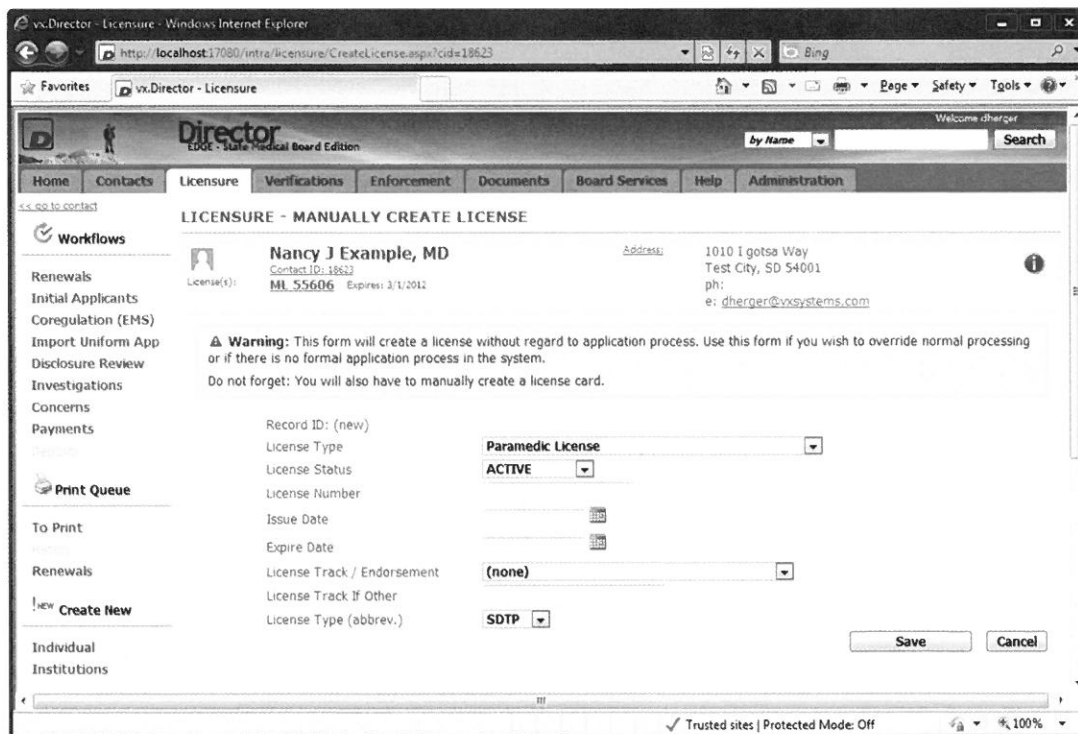
**LICENSURE - VIEW**

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

**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.



The screenshot shows the 'Licensure - Manually Create License' page in the Director web application. The page displays details for a license held by Nancy J Example, MD. The license number is ML 55606, and it expires on 3/1/2012. The license is currently active. The page also shows a list of documents for this license, all of which are 'Certificate/Card' documents issued on 3/10/2011. A 'Print License Card' option is available, with a warning that it will create a license without regard to the application process.

**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)  
License Type: Paramedic License  
License Status: ACTIVE  
License Number: \_\_\_\_\_  
Issue Date: \_\_\_\_\_  
Expire Date: \_\_\_\_\_  
License Track / Endorsement: (none)  
License Track If Other: \_\_\_\_\_  
License Type (abbrev.): SDTP



## Enforcement

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

The screenshot shows a web browser window displaying the 'Director - State Medical Board Edition' application. The page is titled 'ENFORCEMENT - EDIT CONCERN' and is for a contact named 'Evan E. Example, MD'. The contact information includes an address (1020 May Rd, Charlotte, SC 30211), phone number, and email (e: e.example@vxsystems.com). The page features a navigation menu with tabs for Home, Contacts, Licensure, Verifications, Enforcement, Documents, Board Services, Help, and Administration. A left sidebar contains a search bar and a list of menu items including Enforcement, Renewals, Initial Applicants, Coregulation (EMS), Import Uniform App, Disclosure Review, Investigations, Concerns, and Payments. The main content area includes a 'New - To Review' dropdown, a 'Possible falsification of documents' section with a text area containing 'See disclosure #13', an 'Initial Application' section with a reviewer dropdown set to 'dherger (Dennis)' and a date of '5/11/2011', and a 'Special Actions' section with an 'Add to/Create case' button and a 'Create an alert' checkbox. The page concludes with 'Save' and 'Cancel' buttons.


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


**Evan E. Example, MD** 
Address: 1020 May Rd  
Charlotte, SC 30211  
ph:  
e: [e.example@vxsystems.com](mailto:e.example@vxsystems.com)

License(s): Contact ID: 18628

Source of Investigation: **External Report**   
 Description: **License Document Forgery**  
 Status: **Open**   
 Reported Date: **6/1/2011** 

Comments (800 characters or less):  
**USMLE transcript document: Step 1 attempts changed from 4 to 1. See details in SharePoint.**

[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: 

Recent

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.

Navigation: Licensure | Verifications | Enforcement | Documents | Board Services | Help | Administration

**APPLICATION - EDIT**

**Lawrence P. Example, PA**  
 License(s): [Contact ID: 18620](#)  
 Address: 100 Ford St, Dallas, TX 75001  
 ph: [e: dherger5@vxsystems.com](#)

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

**CHECKLIST** [add/edit]

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 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			

**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	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**

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		

Item	Approved Date	Additional Info
Kansas PA 1234		<a href="#">more...</a>

Item	Approved Date	Additional Info
University of Massachusetts		<a href="#">more...</a>
Sealed Copy of Diploma University of Massachusetts		

Internal view of processing

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.



The screenshot shows the Director web application interface. The main content area displays a summary of current tasks and work queues. The 'CURRENT TASKS' section shows 'No Tasks Found.' The 'WORK QUEUES' section is filtered by 'Currently Active' and lists various workflow categories with their respective counts.

Category	Sub-category	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

## New license application processing

vx.Director - Licensure - Windows Internet Explorer

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

vx.Director - Licensure

Director  
EDGE - State Medical Board Edition

by Name Search

Home Contacts Licensure Verifications Enforcement Documents Board Services Help Administration

Workflows

Renewals

Initial Applicants

Coregulation (EMS)

Import Uniform App

Disclosure Review

Investigations

Concerns

Payments

Print Queue

To Print

Renewals

!NEW Create New

Individual

Institutions

> Management

Web Users

APPLICATIONS - PROCESSING

Filter by: Submitted to Initial Review

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	Evan E. Example, MD	ML	IntReview	Details
22427	1/27/2011	1/28/2011	Francis J Example	ML	IntReview	Details
22442	2/25/2011	2/25/2011	Kevin M. Example, PA	PA	IntReview	Details
22444	3/4/2011	3/4/2011	Lawrence P. Example, PA	PA	IntReview	Details
22446	3/7/2011	3/8/2011	Lawrence Albert Example	PA	IntReview	Details
22451	3/8/2011	3/10/2011	Lawrence Albert Example	SDTP	IntReview	Details
22454	3/10/2011	3/10/2011	Mike Example	SDTP	IntReview	Details
22470	3/14/2011	3/14/2011	Mike Example	DI	IntReview	Details
22463	3/13/2011	3/14/2011	Oprah Example, PA	PA	IntReview	Details
22466	3/14/2011	3/14/2011	Oprah Example	AT	IntReview	Details
22473	3/16/2011	3/16/2011	Peter Example	RCP	IntReview	Details
22475	3/17/2011	3/17/2011	Peter Example	OTA	IntReview	Details
22477	3/21/2011	3/21/2011	Queen Example	OTAT	IntReview	Details
22492	5/12/2011	6/6/2011	Ralph Example	ML	IntReview	Details

Trusted sites | Protected Mode: Off

100%

## Workflow detail screen

vX Director - Licensure - Windows Internet Explorer
http://localhost:17080/intra/licensure/AppEditor.aspx?fid=117338&cid=18626&wqid=22492

vx Director - Licensure
Page Safety Tools

Welcome dherger  
by Name  Search

Home
Contacts
Licensure
Verifications
Enforcement
Documents
Board Services
Help
Administration

<< go back to queue

### APPLICATION - EDIT

**Application**

- Overview
- Details
- Address
- School
- PGT
- Exams
- Other Licenses
- Work History
- Malpractice
- Specialty
- DEA
- Practice

View Submitted

**Documents**

- SharePoint
- Document Vault

**Actions**

- Online Acct
- Create License
- Create Concern
- Create Alert
- Create Case

**Ralph Example**

Contact ID: 18626  
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** [Advanced status change]

Current Status: **Pending - Waiting for items submitted**

```

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

**CHECKLIST** [add/edit]

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

**Mark Complete**

**WORK TASKS FOR APPLICATION# 10127**

Start Date	Type	Status	Finalized Date	Complete
5/12/2011	Applicant Process	Pending - Waiting for items submitted	<a href="#">details</a>	<input type="checkbox"/>
6/6/2011	Fee Processing	Unpaid	<a href="#">details</a>	<input type="checkbox"/>

**CONCERNS** [more]

WQ ID	Date	Reason	Status	Finalized Date
22497		<a href="#">Disclosure Questions</a>	New	

**DOCUMENTS FOR THIS APPLICATION** [add/edit]

Name	Type	Date	Comment
<a href="#">Affidavit and Authorization for Release of Information</a>	Release and Authorization	5/12/2011	

Trusted sites | Protected Mode: Off
100%

MAP  
 Status: **Pending - Waiting for items submitted** CURRENT

**Move to Approval** x

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

**Move to Needs Approval** **Cancel**

Subject

Subject	Last Review
Curriculum	Communication
Notarized	Communication 6/6/20
Receipt of Informa	Communication
Postgraduat	
Exams: US	
Employment: Test	Employment

**Complete**

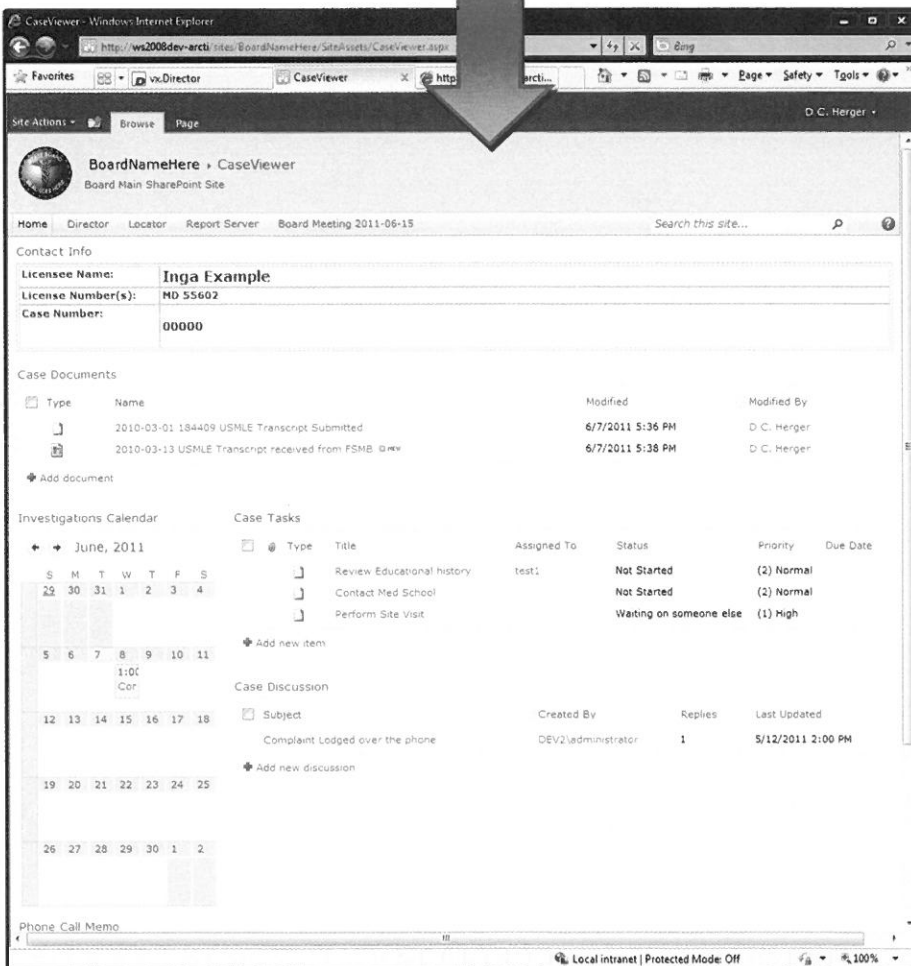
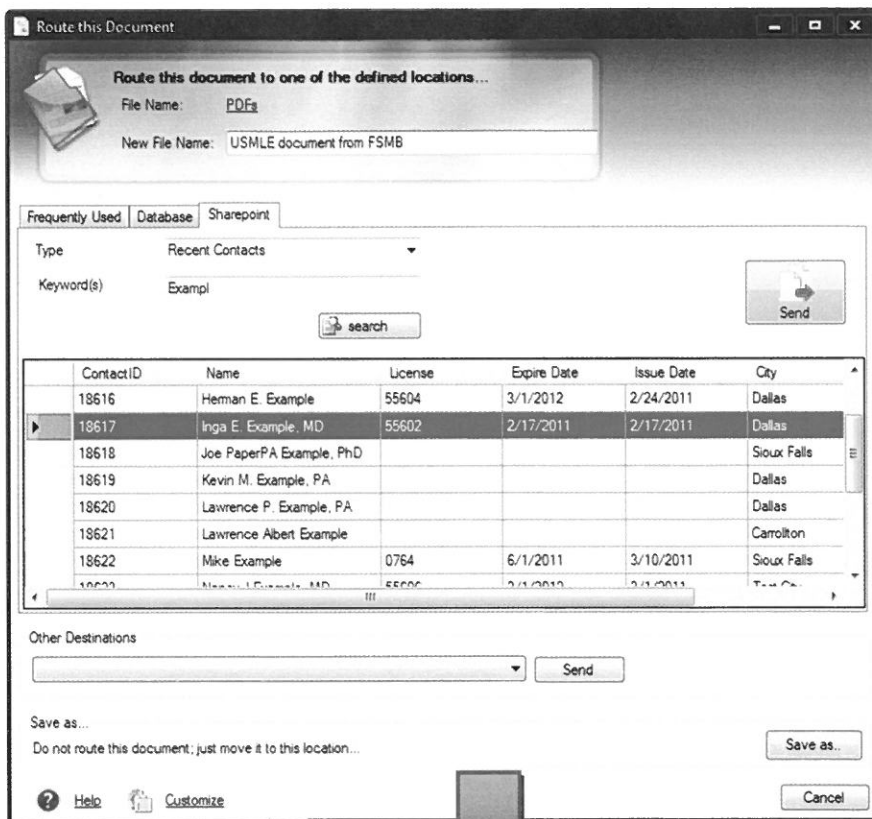
Workflows have rules associated at each step. For example, if you have checklist items that need to be completed before a certain workflow step, then a warning is given when trying to proceed.





## 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 knowledge management has been implemented. This could 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.





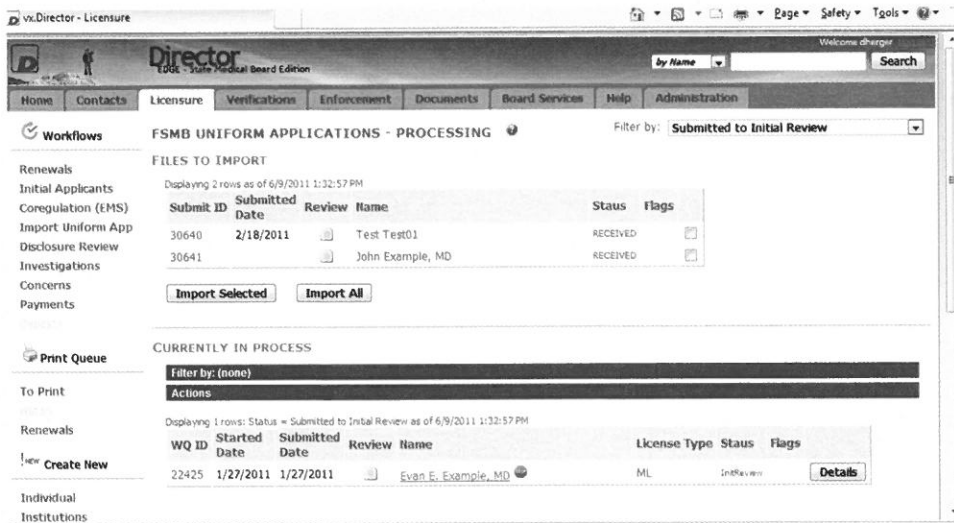


## Connect

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 various Open Source technologies. 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 SQL Server 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.