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Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Request for Quotation
21 - Info Technology

Proc Folder: 177213

Doc Description: Addendum 1-Scanning System Software, Maint., Implementation

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2016-01-04	2016-01-19 13:30:00	CRFQ 0225 PEI1600000007	2

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Name, Address and Telephone Number:

Information Management & Securities, LLC (dba IMS)
4720 East Liberty Street
Mexico, MO 65265
(573) 581-2800

01/07/16 10:53:22
WV Purchasing Division

FOR INFORMATION CONTACT THE BUYER

Linda Harper
(304) 558-0468
linda.b.harper@wv.gov

Signature X

Vince Fuemmeler

FEIN # 26-3074110

DATE 1-5-2016

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION:

Addendum 1 - for administrative changes only. To change the quantity of commodity line (1) in wvOasis to quantity (1) rather than (0), and to change the "unit issue" description to YR rather than PK on commodity lines 3, 4, and 5.

No other changes.

To obtain bids from qualified vendors to establish a contract for image capture software and maintenance (scanning system) per the attached specifications.

INVOICE TO		SHIP TO	
PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST SE CHARLESTON WV25304 US		PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST, SE CHARLESTON WV 25304 US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Addendum 1-Scanning System Software, Maint. Implementation	1.00000	PK	\$21,000.00	\$21,000.00

Comm Code	Manufacturer	Specification	Model #
43230000	Psigen Psi:Capture	Classification Bundle (3, 120K licenses)	PX-230120C

Extended Description :

Scanning System Software (Includes Year 1 Maintenance and Support)

INVOICE TO		SHIP TO	
PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST SE CHARLESTON WV25304 US		PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST, SE CHARLESTON WV 25304 US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Implementation (including training)				Implementation (including training) included in line 1

Comm Code	Manufacturer	Specification	Model #
81111504	IMS	Professional Services	IMS-PS

Extended Description :

Implementation (including training)

INVOICE TO		SHIP TO	
PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST SE CHARLESTON WV25304 US		PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST, SE CHARLESTON WV 25304 US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Renwal Option - Year 2 Maintenance and Support	1.00000	YR	\$6,000.00	\$6,000.00

Comm Code	Manufacturer	Specification	Model #
43230000	Psigen	Annual Maintenance/Support	UXP-230120-C

Extended Description :
Renwal Option - Year 2 Maintenance and Support

INVOICE TO		SHIP TO	
PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST SE CHARLESTON WV25304 US		PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST, SE CHARLESTON WV 25304 US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
4	Renwal Option - Year 3 Maintenance and Support	1.00000	YR	\$6,000.00	\$6,000.00

Comm Code	Manufacturer	Specification	Model #
43230000	Psigen	Annual Maintenance/Support	UXP-230120-C

Extended Description :
Renwal Option - Year 3 Maintenance and Support

INVOICE TO		SHIP TO	
PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST SE CHARLESTON WV25304 US		PUBLIC EMPLOYEES INSURANCE STE 2 601 57TH ST, SE CHARLESTON WV 25304 US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
5	Renwal Option - Year 4 Maintenance and Support	1.00000	YR	\$6,000.00	\$6,000.00

<u>Comm Code</u>	<u>Manufacturer</u>	<u>Specification</u>	<u>Model #</u>
43230000	Psigen	Annual Maintenance/Support	UXP-230120-C

Extended Description :

Renwal Option - Year 4 Maintenance and Support

<u>SCHEDULE OF EVENTS</u>		
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<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Question Deadline 5:00 PM	2016-01-08

SOLICITATION NUMBER: PE11600000007

Addendum Number: 1

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

Applicable Addendum Category:

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

Description of Modification to Solicitation:

Addendum 1 file for administrative changes only. To change the quantity of commodity line (1) in wvOasis to quantity (1) rather than (0), and to change the "unit issue" description to YR rather than PK on commodity lines 3, 4, and 5.

No other changes.

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

Terms and Conditions:

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

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: PEI160000007

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.

Information Management & Securities, LLC (dba IMS)
Company

Vince Fuemmeler

Authorized Signature

January 5, 2016

Date

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

Appendix A

Name of Associate: Information Management & Securities, LLC (dba IMS)

Name of Agency(ies) (Covered Entity): The West Virginia Public Employees Insurance Agency (PEIA)

Describe the PHI. If not applicable please indicate the same.

Per 45 CFR, Part 160.103

Health information means any information, whether oral or recorded in any form or medium, that:

- (1) Is created or received by a health care provider, health plan, public health authority, employer, life insurer, school or university, or health care clearinghouse; and
- (2) Relates to the past, present, or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present, or future payment for the provision of health care to an individual.

Individually identifiable health information is information that is a subset of health information, including demographic information collected from an individual, and:

- (1) Is created or received by a health care provider, health plan, employer, or health care clearinghouse; and
- (2) Relates to the past, present, or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present, or future payment for the provision of health care to an individual; and
 - (i) That identifies the individual; or
 - (ii) With respect to which there is a reasonable basis to believe the information can be used to identify the individual.

Protected health information means individually identifiable health information:

- (1) Except as provided in paragraph (2) of this definition, that is:
 - (i) Transmitted by electronic media;
 - (ii) Maintained in electronic media; or
 - (iii) Transmitted or maintained in any other form or medium.

The Associate, as the defined "Business Partner" will provide administrative, technical, and/or

procedural support to the Covered Entity for purpose(s) of assessing, upgrading, modifying, repairing, or otherwise improving the Covered Entity's scanning system application(s) and/or in related applications used to support the scanning system application(s).

The information provided to, transmitted by, and/or created by the Associate and/or stored and/or maintained by the Associate in electronic form(s) on platform(s) owned, managed and/or administered by the Associate, pursuant to the Agreement will include the minimum necessary to perform the services thereunder and will specifically include, but may not be limited to:

- a) PEIA member and/or dependent individually identifiable health information or protected health information, including but not necessarily limited to, name(s), names of dependent(s), specific identifying information, e.g. address(es), date(s) of birth, social security number(s), policy number(s), etc. that may be viewable in the scanning system application(s) and/or in related applications used to support the scanning system application(s).
- b) PEIA member and/or dependent individually identifiable health information or protected health information necessary to allow the Covered Entity to perform their statutory business function(s) in accordance with State and/or Federal law(s) that may be viewable in the scanning system application(s) and/or in related applications used to support the scanning system application(s).
- c) PEIA member and/or dependent individually identifiable health information protected health information used in relation to interfaces with public websites and/or portals or internal websites and/or portals that may be viewable in the scanning system application(s) and/or in related applications used to support the scanning system application(s).
- d) PEIA member and/or dependent protected health information needed by and/or for other identified Business Associates in the provision of their services to the Covered Entity that involves access to protected health information.
- e) PEIA member and/or dependent individually identifiable health information protected health information transmitted by, used and/or stored on other PEIA application(s) that will interface with the project defined in the scope of work of this Agreement.

EXHIBIT A
PRICING PAGE

The cost **shall include all project costs including travel, meals, etc.** The bidder shall submit the cost proposal in the following format:

Description	Quantity	Unit Cost	Extended Cost
Scanning System Software (includes Year 1 maintenance and support)	1	\$21,000.00	\$21,000.00
Implementation (including training)	1	\$0	\$0
Renewal Option - Year 2 Maintenance and Support	1	\$6,000.00	\$6,000.00
Renewal Option - Year 3 Maintenance and Support	1	\$6,000.00	\$6,000.00
Renewal Option - Year 4 Maintenance and Support	1	\$6,000.00	\$6,000.00
TOTAL BID AMOUNT			\$39,000.00

Renewal options will be initiated by the Agency, agreed to by the Vendor, and processed by the West Virginia Purchasing Division as Change Orders for subsequent years.

The above pricing submitted by IMS represents the following:

Psigen Psi:Capture with OCR, ICR, ADE and Classification/Forms Processing
A total of three (3) licenses which include 120,000 scans per license each year, for a total of 360,000 scans/year. License counts reset January 1st of each year with renewal of maintenance/support.

REQUEST FOR QUOTATION
Scanning System

EXHIBIT B

Optical Character Recognition Forms

Psi:Capture by Psigen Software has several modules included in the base product, including OCR. The Optical Character Recognition (OCR) Module allows the conversion of scanned images into meaningful text. The module can be used to extract document metadata as well as create searchable PDF documents or text. It can also be used in conjunction with other modules to provide classification and data extraction.

Other modules include: Intelligent Character Recognition (ICR), Advanced Data Extraction (ADE), Classification and Forms Processing, and Migration. Psigen has built integrations with over 50 different Enterprise Content Management (ECM) and Document Management Systems (DMS), including Hyland On-Base, ASCII and GP Dynamics.



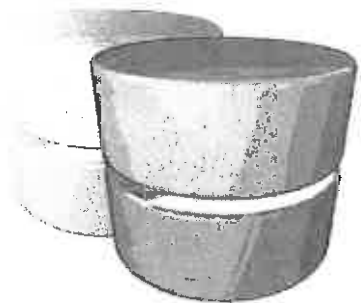
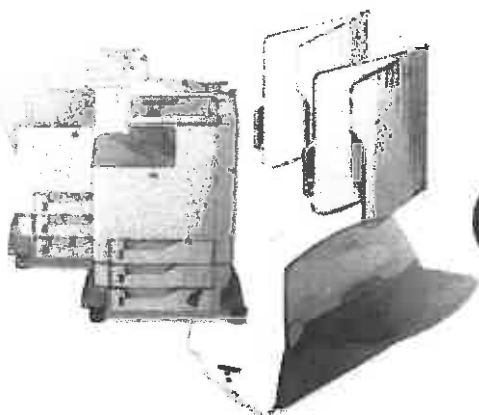
PSI:CAPTURE ENTERPRISE

PSI:CAPTURE ENTERPRISE

ONE-STOP SCANNING AND CAPTURE POWERPLANT

Because today's organizations have so many requirements for scanning and capture, they often opt to use a number of solutions to meet their departmental needs. This decentralized approach increases the processing time, administrative headache, support requirements and overall cost of maintaining a company's document management infrastructure. PSIGEN products provide the ability to consolidate and standardize to a single platform enterprise-wide, providing the utmost in flexibility, and supporting numerous back end systems.

PSIGEN's PSI:Capture enhances the capabilities of any scanning device. Its simple configuration and easy-to-use interface allows for quick deployment and adoption by end users, resulting in an accelerated return on investment.



Capture documents from direct connect scanners, import from network folders, SharePoint libraries or RightFax Fax Servers. PSI:Capture's architecture provides for interactive or automated processing.

Centralized management, configuration and storage provide for flexible and easily globally deployed workflows.

Documents can be migrated into any one of 50+ ECM or DM systems.

PSI: CAPTURE MODULES



CAPTURE

CAPTURE

Our capture module is the first step in any capture workflow. It provides integration with direct-connect scanners, multi-function printers (MFPs) and network-based image folders. The module can be used to interactively scan or import, but can also be automated, allowing auto-import from hot folders, SharePoint Document Libraries (WebDAV folders) RightFax Servers or FTP/SFTP servers.



OCR

OPTICAL CHARACTER RECOGNITION [OCR]

The Optical Character Recognition (OCR) Module facilitates the conversion of scanned images into meaningful text. The module can be used to extract document metadata, as well as create searchable PDF documents or text. It can also be used in conjunction with other modules to provide classification and data extraction.



ICR

INTELLIGENT CHARACTER RECOGNITION [ICR]

Intelligent Character Recognition (ICR) Module provides the ability to extract metadata from documents with hand-printed information, then translates the information into data fields. It also provides the ability to "rubberband" hand-printed text during the indexing process and auto-populate fields.



ADE

ADVANCED DATA EXTRACTION [ADE]

The Advanced Data Extraction (ADE) Module is an advanced data extraction and parsing engine that can intelligently apply scripting or pattern-matching logic to metadata, which provides greater accuracy to OCR, ICR, manual data entry and auto-populated fields. The module virtually eliminates the need for hand-keying information, increases accuracy and reduces the time required for the metadata capture process.



CLASSIFICATION

CLASSIFICATION AND FORMS PROCESSING

PSI:Capture's document classification feature set allows intelligent classification of forms and documents through the use of the OCR and ADE modules. Through our forms processing engine, you can auto-extract complex data structures and information from disparate documents.



TABLE EXTRACTION

TABLE EXTRACTION MODULE [TEM]

PSI:Capture's Table Extraction Module provides a powerful line item extraction technology to speed up the extraction of invoice data and allow AP personnel a quick and easy way to verify and validate data. Once the process is complete, documents and data can be routed to your content management system or your accounting system.