Jump to: FORMS ⬆ Go | 🏠 Home | 🔧 Personalize | Accessibility | ❓ App Help | About | ⏻

Welcome, Lu Anne Cottrill | Procurement | Budgeting | Accounts Receivable | Accounts Payable

Solicitation Response(SR) | Dept: 0506 | ID: ESR08101600000000614 | Ver.: 1 | Function: New | Phase: Final | ▼ | Modified by batch , 08/11/2016

Header

List View

General Information | Contact | Default Values | Discount | Document Information

Procurement Folder: 170611

Procurement Type: Central Contract - Fixed Amt

Vendor ID: 000000163397

Legal Name: LOCAL DATA SOLUTIONS LLC

Alias/DBA:

Total Bid: $2,476,300.00

Response Date: 08/10/2016

Response Time: 15:06

SO Doc Code: CRFQ

SO Dept: 0506

SO Doc ID: MCH1600000003

Published Date: 7/25/16

Close Date: 8/11/16

Close Time: 13:30

Status: Closed

Solicitation Description: ADDENDUM_3 Web-based, performance & case management

Total of Header Attachments: 0

Total of All Attachments: 0

Proc Folder : 170611

Solicitation Description : ADDENDUM_3 Web-based, performance & case management system

Proc Type : Central Contract - Fixed Amt

Date issued	Solicitation Closes	Solicitation Response		Version
	2016-08-11 13:30:00	SR 0506 ESR08101600000000614		1

VENDOR

000000163397

LOCAL DATA SOLUTIONS LLC

Solicitation Number: CRFQ 0506 MCH1600000003

Total Bid : $2,476,300.00 **Response Date:** 2016-08-10 **Response Time:** 15:06:19

Comments:

FOR INFORMATION CONTACT THE BUYER

Mark A Atkins

(304) 558-2307
mark.a.atkins@wv.gov

Signature on File **FEIN #** **DATE**

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	World wide web WWW site design services	1.00000	EA	$32,200.000000	$32,200.00

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description : 4.1.2 Conceptual design of web-based performance and case management system to support the coordination and integration of information and services for CYSHCN (Month 1).

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	World wide web WWW site design services	1.00000	EA	$37,200.000000	$37,200.00

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description : 4.1.3 Written Design of Web-Based Data Collection System (Months 1-2).

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	World wide web WWW site design services	1.00000	EA	$566,500.000000	$566,500.00

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description : 4.1.4 Development of Web-Based Data Collection System (Months 2-5).

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Training workshop services	1.00000	EA	$48,000.000000	$48,000.00

Comm Code	Manufacturer	Specification	Model #
86132201			

Extended Description : 4.1.5 Training (Months 6-8).

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	World wide web WWW site design services	1.00000	EA	$30,000.000000	$30,000.00

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description :	4.1.6 Go-Live for CYSHCN (Month 9).

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Maintenance or support fees (Y1)	1.00000	EA	$440,600.000000	$440,600.00

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :	4.1.7 Maintenance, Support, and Upgrades (Year 1)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
7	Maintenance or support fees (Y2)	1.00000	EA	$440,600.000000	$440,600.00

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :	4.1.8 Maintenance, Support, and Upgrades (Year 2)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
8	Maintenance or support fees (Y3)	1.00000	EA	$440,600.000000	$440,600.00

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :	4.1.9 Maintenance, Support, and Upgrades (Year 3)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
9	Maintenance or support fees (Y4)	1.00000	EA	$440,600.000000	$440,600.00

Comm Code	Manufacturer	Specification	Model #	
81112201				

Extended Description :	4.1.10 Maintenance, Support, and Upgrades (Year 4)

Web-Based Performance and Case Management System

Project Proposal

Local Data Solutions, LLC

Aug 11, 2016

Contents

Overview

The West Virginia Department of Health and Human Resources, Bureau for Public Health, Office of Maternal, Child and Family Health (OMCFH) wishes to establish a contract for a web-based performance and case management system to support the coordination and integration of information and services for children and youth with special health care needs, to be maintained and hosted on Vendor's website during the term of the contract. This proposal outlines how Local Data Solutions, LLC, would fulfill the requirements of that contract.

Local Data Solutions, LLC

Local Data Solutions, LLC (LDS), is a software-development company based in Morgantown, West Virginia, serving local, state, and federal agencies and West Virginia businesses. We provide cost-effective software design, development, and Microsoft Azure cloud-hosting services to businesses and institutions. Our approach to software development ensures businesses and institutions can leverage modern technologies to address everything from simple web presence to the most complicated of business processes. Every application LDS develops is uniquely tailored for each customer's needs and business model.

LDS was established in 2008 by Senior Software Developers Ty Petrice and Parmjit Singh. Both Ty and Parmjit have worked on several major projects at LDS while simultaneously advancing their development skills by working on contracts for the Centers for Disease Control and Prevention's National Institute for Occupational Safety and Health (NIOSH). At NIOSH, they have been and continue to be involved in the development of a wide range of software applications for public health and safety, in areas from mining safety, to publications and website control, to the health aftereffects from the collapse of the World Trade Center on 9/11. Over the last 10 years, they have worked on literally dozens of small, medium, and large systems for the Health Effects Laboratory Division and the Division of Safety Research, serving as project leads and managing numerous other software developers and supporting staff.

A custom application solution requires professional planning from the beginning, and our experienced analysts and programmers have a comprehensive understanding of the technical and personal aspects involved in software development, including requirements analysis, UX/UI design approaches, programming, system infrastructure, and more. Our highly trained team uses modern and proven approaches with technologies to determine and address your organization's needs.

Professional History

LDS has developed multiple significant projects for West Virginia University (WVU):

WVU Birth Score Database

Dashboard and Client Application

LDS is hosting and implementing new features for the Birth Score database system for the WVU Research Corporation and the West Virginia Department of Health and Human Resources (WVDHHR). This system collects childbirth information from more than 35 hospitals and clinics across the state of West Virginia. The collected data are used to identify and track infants who are at the highest risk for health and developmental problems, to ensure these children have access to appropriate health and special-care systems. The hospital uses a screening checklist to identify babies with a greater likelihood of health problems in the first year of life. The families of at-risk children residing in West Virginia will be referred to doctors of their choice, as well as to Office of Maternal, Child, and Family Health (OMCFH) Health Check Program Specialists, or Right From The Start Program nurses or social workers (called Designated Care Coordinators), who are available to offer information and support services.

LDS significantly expanded this system's capabilities and functionality, while ensuring it also complies with HIPAA and meets or exceeds federal information-technology security requirements.

Newborn Hearing Screening

Dashboard and Client Application

In 1998, the West Virginia state legislature amended Chapter Sixteen of the Code of West Virginia by adding Articles 22A and 22B. Article 22A requires the testing of newborn infants for hearing loss, and requires that physicians or midwives attending a live birth ensure that a test for hearing loss is performed. Article 22B authorizes the Bureau for Public Health to establish and implement the Birth Score program and requires that hospitals, birthing facilities, attending physicians, and other persons attending a birth determine a birth score.

LDS has recently developed and is hosting the Newborn Hearing Screening system, a case-management system for the WVDHHR. This system is designed to automate and simplify many of the tasks related to managing infants with hearing loss or impairment. In addition, the system produces annual reports that will be submitted to the CDC. This system is HIPAA-compliant and meets or exceeds federal information-technology security requirements.

Student Rotations System, School of Nursing, WVU

Student Rotations

The rotations system provides nursing students with online patient and activity logs. It also lets faculty manage students, preceptors, and site information. The system provides faculty with the ability to run custom reports and statistics. Administrators of the system can manage the application data, submission deadlines, preceptors and sites information.

West Virginia Health Careers and Opportunity Program, Health Sciences and Technology Academy

HSC Healthcare Opportunities

The Health Careers and Opportunity Program (HCOP) provides students with online application submission and evaluation surveys for various health career programs, and allows counselors to evaluate applications and view statistics. System administrators can manage the application data, submission deadlines, and all counselor functionalities.

West Virginia Prescription Drug Abuse Quitline, Health Sciences and Technology Academy

This online application collects survey data for the West Virginia Prescription Drug Abuse Quitline. The application is written in asp.net using SQL Server database, and allows a staff member to search for an existing record for a caller or to add a new caller to the system. The system provides a selection of surveys to complete, and guides the user through each question and possible responses within the surveys. Responses are recorded so that administrative staff can run reports on the database.

Microsoft Azure Secure Applications Platform

Historically, complete regulated or standard-compliant system solutions were difficult for a small business to provide, as they required significant investment and resources. However, LDS now has the ability to provide enterprise-level solutions. LDS will utilize the Microsoft Azure cloud platform for the proposed project, to create a Secure Application Platform capable of meeting the strictest security standards. This will allow applications with even the most private and sensitive data, including Personally Identifiable Information (PII) and Protected Health Information (PHI), to exist on the platform.

Once created, the Secure Applications Platform will be available as the core of a secured and accredited environment, providing a flexible solution for the Department's current case

management system as well as future application needs. The environment is being built to address internal WVU policies, state and federal law, and standards for a healthcare solution. Similar applications with data categorization at or below the current configuration can be co-located within the platform. This could leverage the certified servers if no system conflicts or competing needs with existing applications are identified during a full integration assessment by LDS. LDS has chosen to utilize Microsoft Azure because it offers the following advantages (cited from http://azure.microsoft.com/en-us/support/trust-center):

Design and Operational Security

- **Security Centers of Excellence.** The Microsoft Digital Crimes Unit, Microsoft Cybercrime Center, and Microsoft Malware Protection Center provide insight into evolving global security threats.

- **Security Development Lifecycle (SDL).** Since 2004, all Microsoft products and services have been designed and built from the ground up using its Security Development Lifecycle - a comprehensive approach for writing more secure, reliable and privacy-enhanced code.

- **Operational Security Assurance (OSA).** The Microsoft OSA program provides an operational security baseline across all major cloud services, helping ensure key risks are consistently mitigated.

- **Assume Breach.** Specialized teams of Microsoft security engineers use pioneering security practices and operate with an "assume breach" mindset to identify potential vulnerabilities and proactively eliminate threats before they become risks to customers.

- **Incident Response.** Microsoft operates a global 24x7 event and incident response team to help mitigate threats from attacks and malicious activity.

Security Controls and Capabilities

- **24-hour monitored physical security.** Datacenters are physically constructed, managed, and monitored to shelter data and services from unauthorized access as well as environmental threats.

- **Monitoring and logging.** Security is monitored with the aid of centralized monitoring, correlation, and analysis systems that manage the large amount of information generated by devices within the environment and providing timely alerts. In addition, multiple levels of monitoring, logging, and reporting are available to provide visibility to customers.

- **Patching.** Integrated deployment systems manage the distribution and installation of security patches. Customers can apply similar patch management processes for Virtual Machines deployed in Azure.

- **Antivirus/Antimalware protection.** Microsoft Antimalware is built in to Cloud Services and can be enabled for Virtual Machines to help identify and remove viruses, spyware and other malicious software and provide real time protection. Customers can also run antimalware solutions from partners on their Virtual Machines.

- **Intrusion detection and DDoS.** Intrusion detection and prevention systems, denial-of-service attack prevention, regular penetration testing, and forensic tools help identify and mitigate threats from both outside and inside of Azure.

- **Zero standing privileges.** Access to customer data by Microsoft operations and support personnel is denied by default. When granted, access is carefully managed and logged. Data center access to the systems that store customer data is strictly controlled via lock box processes.

- **Isolation.** Azure uses network isolation to prevent unwanted communications between deployments, and access controls block unauthorized users. Virtual Machines do not receive inbound traffic from the Internet unless customers configure them to do so.

- **Azure Virtual Networks.** Customers can choose to assign multiple deployments to an isolated Virtual Network and allow those deployments to communicate with each other through private IP addresses.

- **Encrypted communications.** Built-in SSL and TLS cryptography enables customers to encrypt communications within and between deployments, from Azure to on-premises datacenters, and from Azure to administrators and users.

- **Private connection.** Customers can use ExpressRoute to establish a private connection to Azure datacenters, keeping their traffic off the Internet.

- **Data encryption.** Azure offers a wide range of encryption capabilities up to AES-256, giving customers the flexibility to implement the methods that best meets their needs.

- **Identity and access.** Azure Active Directory enables customers to manage access to Azure, Office 365 and a world of other cloud apps. Multi-Factor Authentication and access monitoring offer enhanced security.

Independent Verification

By providing customers with compliant, independently verified cloud services, LDS and Microsoft make it easier for customers to achieve compliance for the infrastructure and applications they run in Azure. Microsoft provides Azure customers with detailed information about security and compliance programs, including audit reports and compliance packages, to help customers assess Azure services against their own legal and regulatory requirements.

In addition, Microsoft has developed an extensible compliance framework that LDS utilizes to enable us to design and build services using a single set of controls, in order to speed up and simplify compliance across a diverse set of regulations and rapidly adapt to changes in the regulatory landscape. More information on specific compliance programs are available here:
https://www.microsoft.com/en-us/TrustCenter/Compliance/default.aspx.

- ISO 27001/27002
- SOC 1/SSAE 6/ISAE 3402 SOC 2
- Cloud Security Alliance CCM
- FedRAMP
- FISMA
- FBI CJIS (Azure Government)
- PCI DSS Level 1
- HIPAA
- CDSA
- Food and Drug Administration 21 CFR Part 11
- FERPA
- FIPS 140-2
- CCCPPF

LDS Software-Development Process Overview

LDS will utilize project management techniques based on PMI's Project Management Body of Knowledge (PMBOK), versions 5 and 6, to establish requirements for and build a web-based performance and case management system to coordinate services and integrate information for children and youth with special healthcare needs. This will provide for a full Software Development Life Cycle (SDLC), and ensure the West Virginia Office of Maternal, Child, and Family Health receives a well thought-out and completely coordinated end product.

Figure 3-1. Project Management Process Groups
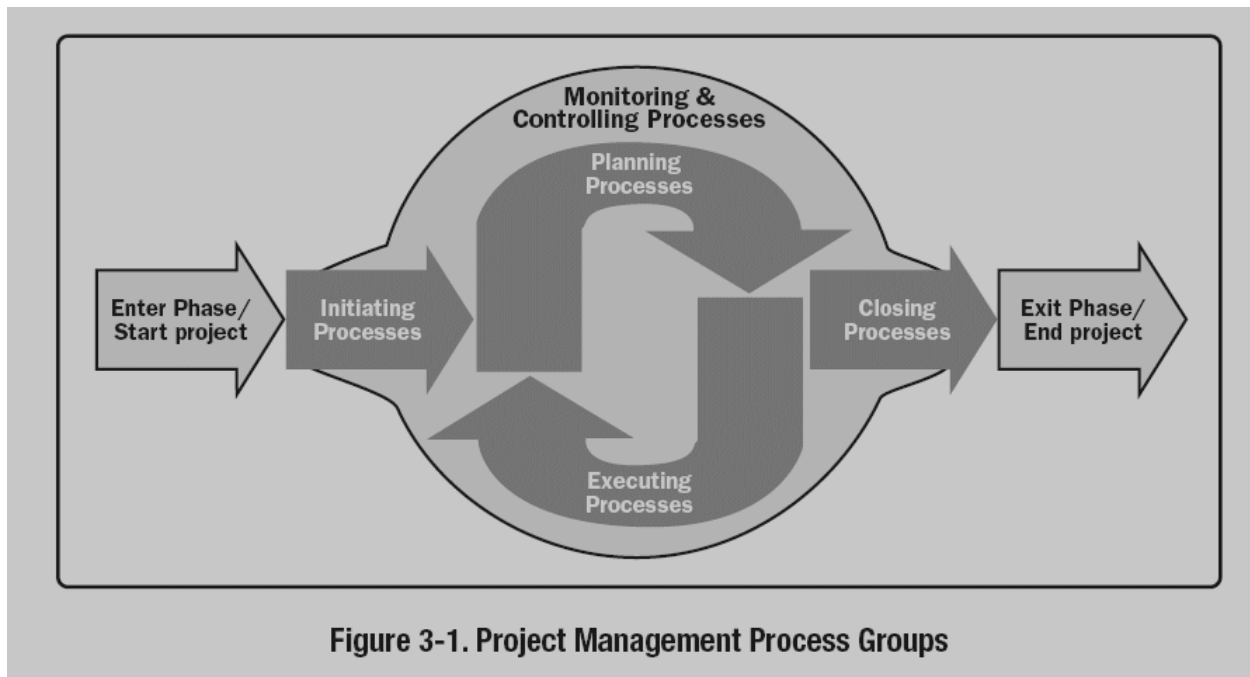
Project Management Process Groups are linked by the outputs which are produced. The Process Groups.
A Guide to the Project Management Body of Knowledge (PMBOK® Guide)—Fifth Edition (ENGLISH) (Kindle Locations 1376-1377).
Project Management Institute. Kindle Edition.

LDS's high-level process steps are:

1. Initiating
2. Planning
3. Executing
4. Monitoring and Controlling
5. Closing and Exiting (project completion)
6. Ongoing Maintenance and Support

The first steps are crucial for effective project planning, and LDS invests great care and deliberation in these initial stages. Before any design or development occurs, we make certain to involve key stakeholders in numerous discussions and thoroughly understand their goals and

concerns for the project. Only then do we being project planning, in accordance with the stakeholders' needs and desires.
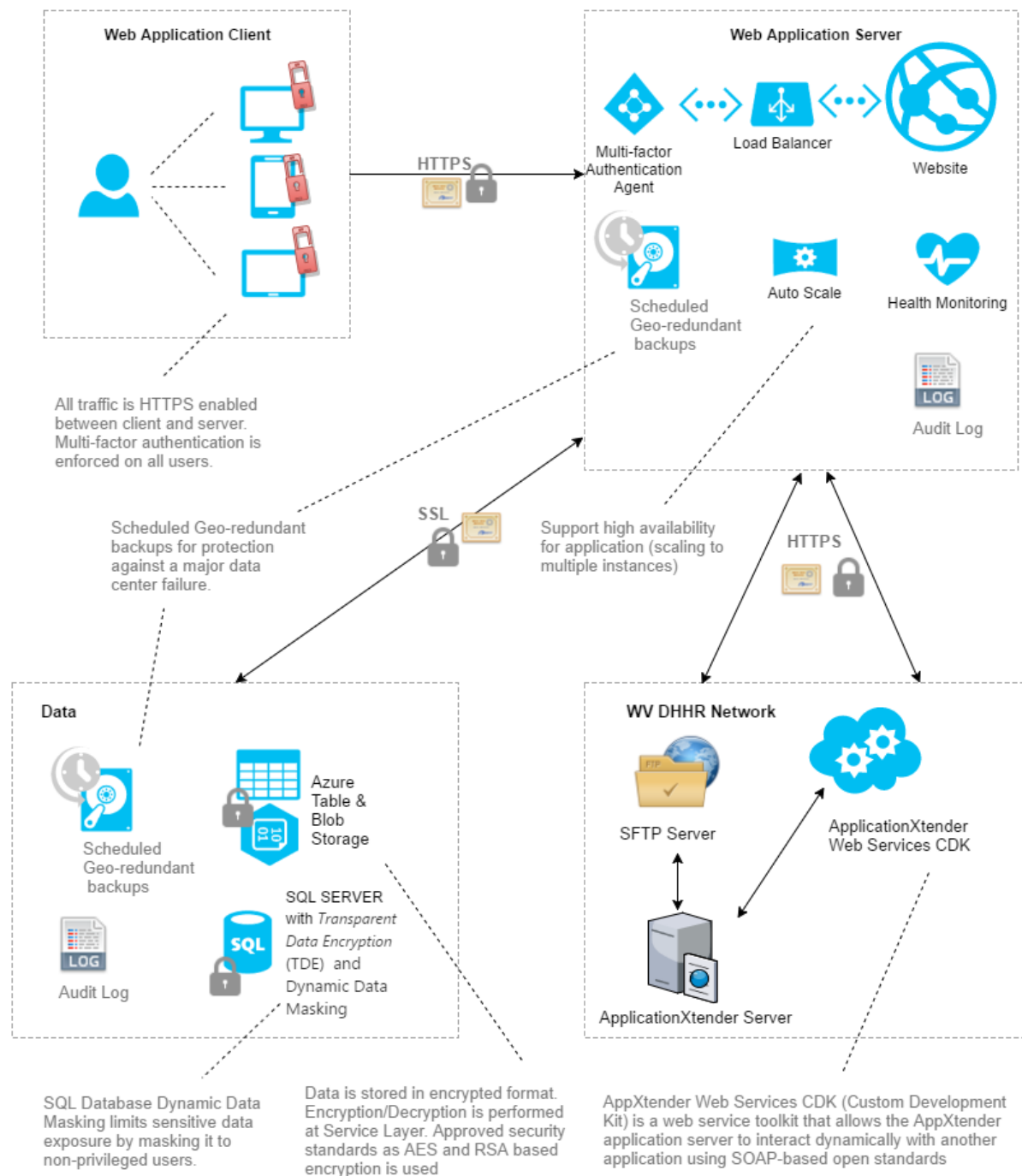
Careful, thorough planning clarifies the system needs and efficiencies, and once planning activities are complete, we again consult with the client regarding the overall design. Prior to execution, the client will have repeated opportunities to review and sign off on the design, and this approval launches the execution of project development.

In the execution stage, all requirements and use cases of the project are correctly implemented and unit tested for positive completion. Throughout these stages, we continuously monitor and control elements to ensure that each of the necessary project steps and activities are happening for the overall success of the project. As the project components are completed, further system, integration, and regression testing occur until the entire system has been completed, with several successfully working modules that make up the whole. Once execution and testing activities have been completed and the system has been thoroughly alpha- and beta-tested, the system will go live in phases in order to monitor system efficiencies and ensure each component functions as intended.

In the closing phase, all stakeholder requirements and use cases are cross-checked with the design, and the stakeholders again sign off on the project. Only after all design components have been checked and approved is the base system considered closed. At that point, the system moves into operational mode, and the client examines and signs off on LDS's continued maintenance and support activities.

Architecture Overview

ETO Case Management System Application Network Diagram

Web Application Client

Web Application Server

HTTPS

Multi-factor Authentication Agent

Load Balancer

Website

Scheduled Geo-redundant backups

Auto Scale

Health Monitoring

LOG
Audit Log

All traffic is HTTPS enabled between client and server. Multi-factor authentication is enforced on all users.

Scheduled Geo-redundant backups for protection against a major data center failure.

SSL

Support high availability for application (scaling to multiple instances)

HTTPS

Data

Scheduled Geo-redundant backups

LOG
Audit Log

Azure Table & Blob Storage

SQL SERVER with *Transparent Data Encryption* (TDE) and Dynamic Data Masking

WV DHHR Network

SFTP Server

ApplicationXtender Web Services CDK

ApplicationXtender Server

SQL Database Dynamic Data Masking limits sensitive data exposure by masking it to non-privileged users.

Data is stored in encrypted format. Encryption/Decryption is performed at Service Layer. Approved security standards as AES and RSA based encryption is used

AppXtender Web Services CDK (Custom Development Kit) is a web service toolkit that allows the AppXtender application server to interact dynamically with another application using SOAP-based open standards

Statement of Work

Define the business processes and identify the components necessary to provide the coordination of benefits and services for children and youth with special health care needs.

After the previous has been completed. The following goals will be accomplished:

1. All business processes necessary to provide the coordination of benefits and services for children and youth with special health care needs.
2. Use Cases that outline how each group of individuals need to access and interact with specific information with regards to the coordinated benefits and services.
3. Improve efficiency for the West Virginia Office of Maternal, Child, and Family Health by enabling a better coordination with providers and care coordinators.

3. QUALIFICATIONS: Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications:

3.1.   Vendor must provide documentation of an executed contract as proof of experience in the delivering and supporting of a performance and case management system currently in operation for at least one (1) State, specific to care coordination for children with specialized health care needs. This documentation should be submitted with bid but must be provided prior to award.

LDS shall provide a Service Level Agreement (SLA) for the Birth Score and Newborn Hearing Screening systems, currently hosted and maintained by LDS for the WVU Research Corporation and WVDHHR. The SLA document will be an additional file attachment to the proposal.

Mandatory Requirements

4.1 Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below.

4.1.1 Efforts to Outcomes (ETO) case management software, or equal. The web-based system will meet the following minimum requirements:

4.1.1.1 Software must track and allow users to access service deliverables

LDS shall provide a web-based service, based on Microsoft technologies such as .NET and SQL Server, for access by stakeholders. These technologies will provide multi-factor authentication that will include SMS or email notification, login-request tracking with IP tagging, and IP-address lockdown. User access and actions will be tracked throughout

the entire system. Data-record changes will be tracked, with the ability to view changes in a side-by-side comparison. Application errors and critical events that happen within the system will produce log entries and notify Support of any user issues with detailed reports of the application issues. The system will allow users to track care-coordination services, client contracts, and medical-foods authorizations, as well as schedule reminders for future services.

4.1.1.2 Software must allow limited access users, such as physicians and caregivers of CYSHCN, the ability to review and approve documents using an electronic signature.

LDS shall provide system characteristics that allow for specific role-based access to relevant documents and signatures. The system will provide notifications to all users when there are documents for review, approval, and signature. Signed documents will become read-only with signature validation. Limited access to documents will be provided for users, based on guidelines established by the system.

4.1.1.3 Software must include a file generation tool which will allow OMCFH to submit required Title V Agency and Federal reports.

LDS shall provide a file-generation tool for submitting required Title V Agency and Federal reports. The generation tool will produce all Title V and Federal reports required for the system in any common file format (for example, .pdf, .docx, .xlsx, .csv). Reports will have predetermined timespans and user-selected start and end timespans. The system will produce Title V reports such as Five-year Needs Assessment Summaries and Yearly MCH Block Grant Applications/Annual Reports.

4.1.1.4 Software must document all data to build and maintain the care plan for the CYSHCN and families receiving OMCFH services and to report on expected program outcomes including information regarding CYSHCN demographics, medical insurance coverage, community and educational services received diagnoses, and treating physicians.

LDS shall provide all needed care plan document build capabilities for CYSHCN, of at least, but not limited to, demographics, medical insurance coverages, community and educational services, received diagnoses, and treating physicians. All data will be stored in a normalized structure that will allow reporting and management of data. LDS will use existing examples of best-practice care plans to record and associate all relevant data.

4.1.1.5 Software must record dates and scores of the Children with Special Health Care Needs Screener© administered with families of CYSHCN.

LDS shall provide a data-input methodology that captures dates and scores of the current CSYHCN. The system will provide an electronic version of the Children with Special Health Care Needs Screener©. The electronic version will capture the survey scores and store them for system reporting and workflow processes. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.6 Software must be able to interface with ApplicationXtender®.

LDS shall provide interface to ApplicationXtender® as part of the overall system. The system will store lists of document links that map to files within WVDHHR implementation of ApplicationXtender®. Document lists will be associated with related data.

4.1.1.7 Software must be able to accept batch uploads from other DHHR systems; i.e. Medicaid Management Information System (MMIS).

LDS shall provide batch-upload capability to the system. The system will accept 835 Health Care Claim files. The system can be developed to accept any text-based exported data source file. A data-definition file will be required for the system to accept batch uploads. The system can be developed to accept EDI HIPAA Transaction files.

4.1.1.8 Software must record client level data on health screening; including referrals and completion of referrals.

LDS shall provide the recording of client-level data on health screening, including referrals and completion of referrals. Data-input fields will be provided through a secure Web portal interface. The system will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.9 Software must record Consents to Release Information to professionals of CYSHCN.

LDS shall provide the ability to record Consents to Release Information to professionals of CYSHCN. Data-input fields will be provided through a secure web portal interface.

The system will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.10 Software must have the ability to accept batch uploads for all data elements within the system.

LDS shall provide the ability to accept batch uploads of all data elements in the system. The system will provide administrators with the ability to batch-upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting. The system will accept batch uploads of exported data from Families and Children Tracking System (FACTS) and West Virginia Medicaid Management Information System (MMIS), such as CSHCN computerized reports produced by MMIS (WEHC).

4.1.1.11 Software must record communications among integrated medical homes.

LDS shall provide a method for recording communications among integrated medical homes. The system will provide a message portal for sending and receiving secure communications, such as secure documents. All communication will be tracked and available to system administrators for auditing. The system will track contacts between members of the client's medical home, CSHCN Program care coordinators, the client and/or family, the primary-care physician, medical specialists, therapists, the educational system, vendors, and any other contact associated with an individual's case management.

4.1.1.12 Software must provide a comprehensive view of CYSHCN participants across all programs and sites to users with appropriate authority.

LDS shall provide a comprehensive view of CYSHCN participants across all programs and sites to all users based on their credentials and roles. The system will provide a logical navigation to all data associated with an individual.

4.1.1.13 Software must maintain data on CSHCN Program eligibility, including initial and annual eligibility determinations and subsequent reapplications.

LDS shall provide maintained data on CSHCN Program eligibility for both initial and subsequent reapplications. The system will use business rules to evaluate individuals

on a determined schedule. Notifications will be sent to the user for annual eligibility determinations and subsequent reapplications as needed.

4.1.1.14 Software must record care coordination activities and related data, including but not limited to the following:

- Home and site visits
- Assessments
- Care plans
- Medical summaries
- Transition
- CYSHCN contacts
- Case comments
- Any information pertinent to the client's official record.

LDS shall provide for the recording of activities of, but not limited to, the areas of home and site visits, assessments, care plans, medical summaries, transition, CYSHCN contacts, case comments, and any information pertinent to the client's official record. Data-input fields will be provided through a secure web portal interface. The system will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.15 Software must allow for the electronic entry of CSHCN Program forms and maintain a historical record of data entered into these forms.

LDS shall provide for electronic entry of CSHCN Program forms, and maintain historical data as it relates to these forms. All data entry in the forms will be tracked and the history of changes will be maintained. Access to the history will be limited by user role within the system.

4.1.1.16 Software must generate form letters for correspondence between the CSHCN Program, CYSHCN, and the medical home. Software must accommodate unlimited modifications to letterhead of said form letters.

LDS shall provide the capability for the system to create and generate CSHCN program form letters for correspondence among CYSHCN and medical homes, with unlimited modifications to letterheads of these letters.

4.1.1.17 Software must record data on emergency room and urgent care center utilization.

LDS shall provide for system to record data on emergency room and urgent care center utilization. Data-input fields will be provided through a secure web portal interface. Users determined by the system will be able to enter emergency room and urgent care center utilization data. The system will provide administrators with the ability to batch upload data from other systems, such as the West Virginia Medicaid Management Information System. Data will be stored in a Microsoft SQL Server database and available for reporting. The system will record data that may include, but is not limited to, appointment date and times, outcomes from hospital admissions, discharges, and attendance.

4.1.1.18 Software must record data on physician visits, including both well-child and acute care visits.

LDS shall provide for system to record data on physician visits, including both well-child and acute care visits. Data-input fields will be provided through a secure Web portal interface. Users determined by the system will be able to enter any physician-visit data. The system will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.19 Software must maintain CSHCN Program clinical services data regarding scheduling, clinic outcomes, appointment outcomes and reason(s) for cancellation.

LDS shall provide for the system to maintain CSHCN Program clinical services data regarding scheduling, clinic outcomes, appointment outcomes, and reason(s) for cancellation. Data-input fields will be provided through a secure web portal interface. Users determined by the system will be able to enter data for CSHCN Program clinical services data regarding scheduling, clinic outcomes, appointment outcomes, and reason(s) for cancellation. The system will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.20 Software must record data from physician and family surveys.

LDS shall provide for the system to record data from physician and family surveys. Data-input fields will be provided through a secure web portal interface. Users determined by the system will be able to enter data from physician and family surveys. The system

will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.21 Software must record data from CYSHCN pre- and post-intervention assessments.

LDS shall provide for system to record data from CYSHCN pre- and post-intervention assessments. Data-input fields will be provided through a secure web portal interface. Users determined by the system will be able to enter data from CYSHCN pre- and post-intervention assessments. The system will provide administrators with the ability to batch upload data for all input fields. Data will be stored in a Microsoft SQL Server database and available for reporting.

4.1.1.22 Software must allow for differential levels of access for different users, including CYSHCN and family.

LDS shall provide for the system to allow for differential levels of access for different users, including CYSHCN and family. The system will provide a web interface for managing user-assigned roles. The system will identify all data-access roles and restrictions. User access will be tracked and logged for historical and auditing purposes. The system will allow family members' access to be managed from the individual's access/preference settings.

4.1.1.23 Software must enable the State to make changes without additional programming. (For example: creating new forms or assessments, creating new entities, creating new demographics and creating ad-hoc reports).

LDS shall provide for the system to enable the State to make changes without additional programming. LDS shall implement Microsoft Power BI (Business Intelligence) based reports, allowing users to customize reports in order to easily visualize and analyze data.

4.1.1.24 Software must allow the Title V Agency to extract data for ad-hoc data analysis and reporting in other programs (Microsoft Excel, Microsoft Access, SAS, Stata, and IBM SPSS).

LDS shall provide for the system to allow the Title V Agency to extract data for ad-hoc data analysis and reporting in other programs. The system will provide a Web interface that will allow users to select data fields associated with Title V to be included in the

report. The system will provide a date-range filter and any other applicable filters needed to produce the report. The report results will be available for export to any standard data source file, such as CSV, Excel, or PDF and other data formats (Microsoft Access, SAS, Stata, and IBM SPSS).

4.1.1.25 Software must enable the use of wizards (a built-in tool that provides step-by-step guidance through a set procedure) to quickly build new graphs for selected outcomes. The graphs should show change over time with filters by population.

LDS shall enable the use of wizards (built-in tools that provide step-by-step guidance through a set procedure) to quickly build new graphs for selected outcomes. The system will provide a step-by-step wizard interface for reporting of selected outcomes. The wizard interface will allow multiple graphs to be selected by the user, and provide the user with the ability to select inputs on which to report. The wizard interface will provide multiple filters for the report, including the ability to filter by population.

4.1.1.26 Software must enable duplicate check settings to be established on multiple demographic elements and include like or exact matches.

LDS shall provide for the system to enable duplicate check settings to be established on multiple demographic elements and include like or exact matches. The system will check for duplicated individuals as well as duplicated information associated with individuals. The system will provide a web interface for resolving duplicate conflicts during batch imports for all data fields.

4.1.1.27 Software must enable the Title V Agency to create ad-hoc reports and must include licensing for ad-hoc report creation and publishing.

LDS shall provide for the system to enable the Title V Agency to create ad-hoc reports and include licensing for ad-hoc report creation and publishing, as well as any additional licensing that may be required. The Title V ad-hoc reporting will be developed in a way that will minimize dependency for additional licenses of this type. All reports will be available in .csv and .xslx formats, able to be opened by Microsoft Excel and Access.

4.1.1.28 Software must enable data sharing among providers governed by rules established within the system.

LDS shall provide for the system to enable data sharing among providers governed by rules established within the system. The system will provide data sharing for users based on roles and business rules established by the system. The data that will be available for sharing will include data associated with individuals as well as associated documents that have been added.

4.1.1.29 Software must provide for a notification engine to generate email and dashboard based notifications based on events within the software. The business rules should be able to be set and changed by the Title V Agency over time.

LDS shall provide for a notification engine to generate email- and dashboard-based notifications based on events within the software. The business rules will be able to be set and changed by the Title V Agency over time. The system will provide a web interface for configuring user-level, system-level, and process notifications. Notifications can be configured on a user level to be sent via email and/or SMS.

4.1.1.30 Software must enable correlation reporting through wizard based tools to enable rapid analysis of client outcomes.

LDS shall provide for the system to enable correlation reporting through wizard-based tools to enable rapid analysis of client outcomes. The system will provide a step-by-step wizard interface for the reporting of client outcomes. The wizard interface will allow multiple graphs to be selected by the user, and provide the user with the ability to select inputs on which to report. The wizard interface will provide multiple filters for reports.

4.1.1.31 Software must include configurable dashboard views for participants, families, entities and staff.

LDS shall provide for the system to include configurable dashboard views for participants, families, entities, and staff. The system will allow the user to select system-defined views, lists, and graphs to create a customizable dashboard. The system-defined views, lists, and graphs will also represent data fields customizable by participants, families, entities, and staff.

4.1.1.32 Software must include an open web services based application programming interface (API) to facilitate data integration using Simple Object Access Protocol (SOAP) standards.

LDS shall provide for the system to include an open web services-based application programming interface (API) to facilitate data integration using Simple Object Access Protocol (SOAP) standards. LDS shall leverage Windows Communication Foundation (WCF) technology that enables applications in a distributed environment to communicate with each other securely and reliably across platforms.

4.1.1.33 Software must include a searchable online help manual for all functions.

LDS shall provide for the system to include a searchable online help manual for all functions. The system will provide a content management interface for system administrators, for updating the online help manual.

4.1.1.34 Software must include search functionality for participants, entities and families.

LDS shall provide for the system to include search functionality for participants, entities, and families. The system will provide a web interface for users to select multiple filters for search results.

4.1.1.35 Software must enable access to ApplicationXtender® where documents are to be uploaded and attached to client records.

LDS shall provide for the system to enable access to ApplicationXtender® where documents are to be uploaded and attached to client records.

4.1.1.36 Software must provide security support for HIPAA compliance in accordance with West Virginia DHHR privacy policies.

LDS shall provide for security support for HIPAA compliance in accordance with West Virginia DHHR privacy policies as listed at https://www.wvdhhr.org/privacy.asp.

4.1.1.37 Batch import must allow for multiple search criteria simultaneously, including but not limited to the following:
- Wildcard search capabilities (in case of misspelling of names).
- DOB: Date of Birth.
- Name (first, middle, and last).
- Geographic location.

LDS shall provide for the system to allow for multiple search criteria simultaneously, including, but not limited to: wildcard search capabilities (in case of misspelling of names), date of birth, name (first, middle, and last), and geographic location. The system will check for duplicated individuals as well as duplicated information associated with individuals. The system will provide a web interface for resolving duplicate conflicts during batch imports for all data fields. The system can be configured to integrate with Molina using their API.

4.1.1.38 Software must generate reminders for well-child visits due based on calculation of age and previous appointment dates.

LDS shall provide for the system to generate reminders for well-child visits due based on calculation of age and previous appointment dates. The system will generate reminders for individuals that follow the schedule "Recommendations for Preventive Pediatric Health Care" located at https://www.aap.org/en-us/Documents/periodicity_schedule.pdf. The system will allow users to configure reminders manually in addition to generating them on the recommended schedule. The system will display reminders on the user dashboard and send reminder emails and/or SMS to a phone number, depending upon user preferences.

4.1.1.39 Family information must relate to client in a one to many relationship, meaning the client's record is the primary record but information from multiple related records can be linked back to the client's record for easy reference.

LDS shall provide for the system to handle family information that must relate to client in a one-to-many relationship, meaning the client's record is the primary record but information from multiple related records can be linked back to the client's record for easy reference. The system will be designed to store information in normalized data structure. The data structure will use one-to-one, one-to-many, and many-to-many relationships based on how the information is related. The system will provide user navigation to related records for their level of authorization at the record and system level.

4.1.1.40 Software must allow users to view premade reports reflecting the client(s) information based upon the user's level of authorization.

LDS shall provide for the system to allow users to view premade reports reflecting the client(s) information based upon the user's level of authorization.

4.1.1.41 Software must have a limited deletion role – only the System Administrator will be authorized to delete.

LDS shall provide for the system to have a limited deletion role – only the System Administrator will be authorized to delete. The system will use record-level data flags that indicate that a record is deleted, and therefore will not be displayed in any views or reports and is not included in a client's workflow process.

4.1.1.42 Software must allow for records to be marked as inactive and the information be excluded in reports.

LDS shall provide for the system to allow for records to be marked as inactive and the information to be excluded from reports. The system will use record-level data flags that indicate that a record is inactive, and therefore will not be included in any reports or in a client's workflow process.

4.1.1.43 Software must allow for records to be reactivated, at which point all existing information will be included in reports.

LDS shall provide for the system to allow for records to be reactivated, at which point all existing information will be included in reports.

4.1.1.44 Software must track individual transactions for Title V funded services by services and client.

LDS shall provide for the system to track individual transactions for Title V funded services by services and client. The system will have the capability to track authorization data, such as:
- **Date of service**
- **Start, end and termination dates**
- **Total cost of service**
- **Total units authorized**

- **HCPCS code**
- **Product provided**
- **Vendor**

The system will have the capability to track financial transactions to providers for clinical services rendered, such as:
- **Date of service**
- **Amount**
- **Service provided**
- **Service provider**

4.1.1.45 Software must set alerts based on defined formulas calculated using dates or manually entered ones.

LDS shall provide for the system to set alerts based on defined formulas calculated using dates or manually entered ones. The system will establish a pre-determined list of events within the system for all processes. The system will provide an interface to configure alerts. The system will display alerts on the user dashboard and send alert emails and/or SMS to a phone number, depending upon user preferences.

4.1.2 Conceptual design of web-based performance and case management system to support the coordination and integration of information and services for CYSHCN (0 – 30 calendar days after contract start date).

4.1.2.1 Vendor will attend and participate in a meeting at OMCFH located at 350 Capitol Street, Charleston, West Virginia 25301 to develop a conceptual design. This meeting will last no longer than two (2) days. Vendor will be responsible for all costs incurred for its staff to attend the session; including travel expenses, lodging and meals.

4.1.2.2 Vendor, OMCFH and West Virginia Office of Technology (WVOT) staff will work together during the meeting to ensure the conceptual design focuses on functional requirements, administrative requirements, system maintenance requirements, and reporting requirements.

Within 0 to 30 calendar days after contract start date, LDS shall attend and participate in a meeting with OMCFH and West Virginia Office of Technology (WVOT) staff at 350 Capitol Street, Charleston, West Virginia 25301, and will work with staff during the meeting to ensure the conceptual design focuses on functional requirements, administrative requirements, system-maintenance requirements, and reporting requirements. LDS will continue to work with OMCFH beyond the meeting(s) and during the time period to develop the system design. LDS will send two (2) individuals

to the design meeting: one (1) to participate and one (1) to capture all information discussed.

LDS's history of software development enables us to develop solutions from concept to final product, and our experience allows us to provide useful feedback during meetings that results in the design of valuable products.

4.1.3 Written Design of Web-Based Data Collection System (31 – 60 calendar days after contract start date).

4.1.3.1 Vendor will complete a written design (blueprint) for the web-based performance and case management system based upon the conceptual design phase and provide copies to OMCFH for review and approval. During the written design phase, vendor will communicate with OMCFH as often as necessary by telephone and will provide progress reports to OMCFH via email every two weeks.

Within 31 to 60 calendar days after contact start date, LDS shall complete a written design (blueprint) for the web-based performance and case management system based upon the conceptual design phase and provide copies to OMCFH for review and approval. During the written design phase, LDS will communicate with OMCFH as often as necessary by telephone and will provide progress reports to OMCFH via email every two (2) weeks. LDS will provide use case diagrams, data-definition diagrams, and workflow diagrams to help describe the requirements of the system. LDS will provide OMCFH with the final requirements document for review and approval.

4.1.4 Development of Web-Based Data Collection System (61 – 150 calendar days after contract start date).

4.1.4.1 Vendor will use the OMCFH approved written design to develop/implement the web-based performance and case management system to support the coordination and integration of information and services for CYSHCN.

Within 61 to 150 calendar days after contract start date, LDS shall complete, based on the OMCFH-approved written design, the web-based performance and case management system to support the coordination and integration of information and services for CYSHCN. LDS will employ a staff of software engineers to build the case management system using RAD (Rapid Application Development), and will leverage Microsoft technologies such as Azure, .NET, and SQL Server.

4.1.5 Training (151 – 240 calendar days after contract start date).

4.1.5.1 Vendor will provide at least one (1) train-the-trainer workshop for the CSHCN administration team at 350 Capitol Street, Charleston, West Virginia 25301. Vendor will

be responsible for all costs incurred for its staff to attend the session; including travel expenses, lodging and meal.

Within 151 to 240 calendar days after contract start date, LDS shall provide at least one (1) train-the-trainer workshop for the CSHCN administration team at 350 Capitol Street, Charleston, West Virginia 25301. LDS will be responsible for all costs incurred for its staff to attend the session, including travel expenses, lodging, and meals.

4.1.5.2 Vendor will develop and provide the following training materials for OMCFH approval.

LDS shall develop and provide the following training materials for OMCFH approval. LDS will employ a communication specialist to develop training materials for the case management system.

4.1.5.2.1 Advanced User and Basic User Training Guides with step-by-step instructions (in PDF format) for using the web-based data collection system and generating reports.

LDS shall provide Advanced User and Basic User Training Guides with step-by-step instructions (in PDF format) for using the web-based data-collection system and generating reports.

4.1.5.2.2 Basic User Training Webinar that includes step-by-step instructions for using the web-based data collection system and generating reports. Webinar will become the property of OMCFH upon delivery; be hosted on OMCFH's website; and will be used as a refresher course tool.

LDS shall provide a Basic User Training Webinar that includes step-by-step instructions for using the web-based data-collection system and generating reports. The webinar will become the property of OMCFH upon delivery, will be hosted on OMCFH's website, and will be used as a refresher-course tool.

4.1.5.2.3 Advanced User Training Webinar that includes step-by-step instructions for system development. Webinar will become the property of OMCFH upon delivery and will be hosted on OMCFH's website

LDS shall provide an Advanced User Training Webinar that includes step-by-step instructions for system development. The training will instruct the system administrator on how to add, update, and remove components within the system. The webinar will become the property of OMCFH upon delivery and will be hosted on OMCFH's website.

4.1.6 Go-Live for CYSHCN (241 – 270 calendar days after contract start date)

4.1.6.1 Vendor will make software available live on its website at which time the WV Office of Technology will link it to OMCFH's website resulting in it being available for full use by OMCFH and authorized local pediatric provider users. All data captured will be owned by OMCFH.

Vendor will provide all software source codes or escrow (at vendor's expense) all software source codes to ensure that the State obtains access to the software source codes should the maintenance of the software cannot otherwise be assured.

Any escrow agreement will be between the vendor, the OMCFH and the escrow agent. After a mandatory verification by the OMCFH, the escrow agent will hold all software source codes.

At the moment the vendor can no longer guarantee business continuity, the escrow agent will ensure that the software source codes are released to the OMCFH.

Within 241 to 270 calendar days from contract start date, LDS shall make software available live on its website, at which time the WV Office of Technology will link it to OMCFH's website, resulting in it being available for full use by OMCFH and authorized local pediatric provider users. All data captured will be owned by OMCFH.

LDS shall provide all software source codes or escrow (at LDS's expense) all software source codes to ensure that the State obtains access to the software source codes should the maintenance of the software not otherwise be assured.

Any escrow agreement will be between LDS, the OMCFH, and the escrow agent. After a mandatory verification by the OMCFH, the escrow agent will hold all software source codes.

At the moment LDS can no longer guarantee business continuity, the escrow agent will ensure that the software source codes are released to the OMCFH.

Maintenance, Support, and Upgrades (Year 1)

4.1.7.1 Vendor will provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

LDS shall provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

4.1.7.2 Vendor will provide maintenance and will include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

LDS shall provide maintenance and shall include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

4.1.7.3 Vendor will provide access for all registered users to web-based software trainings offered no less than weekly for the duration of the contract.

LDS shall provide access for all registered users to live web-based software trainings offered no less than weekly for the duration of the contract. LDS would offer up to six (6) live in-person training sessions if venue is provided by WVDHHR.

4.1.7.4 Vendor will develop and maintain updates to an established project timeline with anticipated completion dates (see 4.1.3.1 for more detail).

LDS shall develop and maintain updates to an established project timeline with anticipated completion dates. LDS shall provide OMCFH with bi-weekly progress reports and timeline updates.

Maintenance, Support, and Upgrades (Optional Renewal Year 2)

4.1.8.1 Vendor will provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

LDS shall provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

4.1.8.2 Vendor will provide maintenance and will include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

LDS shall provide maintenance and shall include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon

the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

4.1.8.3 Vendor will provide access for all registered users to web-based software trainings offered no less than weekly for the duration of the contract.
LDS shall provide access for all registered users to live web-based software trainings offered no less than weekly for the duration of the contract. LDS would offer up to six (6) live in-person training sessions if venue is provided by WVDHHR.

4.1.8.4 Vendor will develop and maintain updates to a project timeline with anticipated completion dates (see 4.1.3.1 for more detail).

LDS shall develop and maintain updates to an established project timeline with anticipated completion dates. LDS shall provide OMCFH with bi-weekly progress reports and timeline updates.

Maintenance, Support, and Upgrades (Optional Renewal Year 3)

4.1.9.1 Vendor will provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

LDS shall provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

4.1.9.2 Vendor will provide maintenance and will include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

LDS shall provide maintenance and shall include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

4.1.9.3 Vendor will provide access for all registered users to web-based software trainings offered no less than weekly for the duration of the contract.

LDS shall provide access for all registered users to live web-based software trainings offered no less than weekly for the duration of the contract. LDS would offer up to six (6) live in-person training sessions if venue is provided by WVDHHR.

4.1.9.4 Vendor will develop and maintain updates to a project timeline with anticipated completion dates (see 4.1.3.1 for more detail).

LDS shall develop and maintain updates to an established project timeline with anticipated completion dates. LDS shall provide OMCFH with bi-weekly progress reports and timeline updates.

Maintenance, Support, and Upgrades (Optional Renewal Year 4)

4.1.10.1 Vendor will provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

LDS shall provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.

4.1.10.2 Vendor will provide maintenance and will include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

LDS shall provide maintenance and shall include all upgrades of the web-based data system (specific to the license purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ.

4.1.10.3 Vendor will provide access for all registered users to web-based software trainings offered no less than weekly for the duration of the contract.

LDS shall provide access for all registered users to live web-based software trainings offered no less than weekly for the duration of the contract. LDS would offer up to six (6) live in-person training sessions if venue is provided by WVDHHR.

4.1.10.4 Vendor will develop and maintain updates to a project timeline with anticipated completion dates (see 4.1.3.1 for more detail).

LDS shall develop and maintain updates to an established project timeline with anticipated completion dates. LDS shall provide OMCFH with bi-weekly progress reports and timeline updates.

Licensing, Software, Hardware, Support Terms and Conditions:

4.1.11.1 Vendor should provide with their bid a copy of any hardware or software licensing and/or support terms and conditions either in writing or digitally, that the Vendor requires for the Agency to order and receive the commodities or services offered as part of this contract. All Vendor requirements must be submitted in writing prior to the award of any contract resulting from this solicitation or disqualification of the Vendor's bid may result.

LDS shall provide with our bid a copy of any hardware or software licensing and/or support terms and conditions either in writing or digitally, that the LDS requires for the Agency to order and receive the commodities or services offered as part of this contract. All LDS requirements shall be submitted in writing prior to the award of any contract resulting from this solicitation.

Contact Information and Staffing

Business/Contractual Contact

Any questions regarding contractual terms and conditions in this proposal can be directed to:

W. Grant Norman, EdD, PMP
Program Manager
304-692-9000
wgnorman@gmail.com

Technical Resources Contacts

Upon contract award, LDS will provide a single support-line number. In the interim, any questions regarding technical aspects of this proposal can be directed to:

Ty Petrice, MSSE
Lead Architect/Software Team Lead
304-641-1767
ty@localdatasolutions.com

Parmjit Singh, MSE
Lead Analyst/Senior Software Developer
304-906-8449
parmjit@localdatasolutions.com

Management Team

<p align="center">W. Grant Norman, Ed.D., PMP
Program/ Project Manager</p>

Profile highlights

- 10+ years overall software development management experience
- 10+ years program/project management experience – Doctorate in Technology
- 15+ years commercial, government, and education client work experience
- 2 years contractor project lead, WV DHHR OBHS Medicaid Program
- CMMI Software Process Consulting / Project and Program Management
- 20+ years software development experience – Masters in Software Engineering
- Collaborative partnership building between clients, management, and staff
- Experienced in translating customer needs into established processes and requirements
- Project budgeting, planning, and management experience
- Software and IT team building, development, and training experience
- Presentations, lectures, and teaching at conferences, at college and technical levels

Education and Certifications

2016 to 2018   **Doctor of Information Technology** – Project Management (Pursuing projected graduation 2018)
Capella University, Minneapolis MN

2014 to 2016   **Master of Science** – Integrated Communications and Marketing (May 2016)
West Virginia University, Morgantown WV

2003 to 2007   **Doctor of Education in Technology** – Software Process Model Adoption (May 2007)
West Virginia University, Morgantown WV

2001 to 2003   **Master of Science** – Software Engineering (Aug 2003)
West Virginia University, Morgantown WV

Renewed thru 2018   **Project Management Professional**
PMP # 527104 Certification (2008)

2002   **Certified Internet Web Associate**
CIW # 0170595 Certification (2002)

Career History

NETL, DOE – OST, Morgantown/Pittsburgh   2014 to 2016
Infrastructure Manager, ITOMS Contract

West Virginia University, Morgantown, WV   2012 to 2014
Project Manager, OIT, Project Management Office

CDC/NIOSH, Morgantown, WV   2005 to 2011
Program Manager – Contractor

West Virginia University, Morgantown, WV   2006
Adjunct Instructor

FBI Contractor, Clarksburg, WV   2004 to 2005

Publications and Presentations

Norman, W.G. (2009) A Grounded Theory of Software Process Model Adoption, VDM Verlag, Germany.

Norman, W.G. (2007, March). Leading change for continued process improvement. Presentation session presented at the (SEPG 2007) Software Engineering Process Group conference, Austin, TX.

Norman, W.G. (2006, March). Implementing CMMI in a small organization. Poster session presented at the (SEPG 2006) Software Engineering Process Group conference, Nashville, TN.

Ty Petrice, MSSE, Principal
Lead Architect / Software Team Lead

Profile highlights

- 13+ years of software development experience
- Extensive background developing and managing database-driven, web-based information systems and teams
- Full SDLC (Software Development Lifecycle) experience and training
- Skilled software developer who works with the latest technologies
- Expert knowledge of AngularJS-based client UI/ SPA applications and responsive website design
- Experienced with MS SQL Server, ASP.NET, WPF, Entity Framework; Code First approach
- Experienced with LINQ, XML, XSLT, AJAX, XAML, C# and VB.NET technologies/languages
- Experienced in translating customer business needs into requirements
- Experienced manager of software teams
- Case management systems development experience

Education

2003 to 2006	**Master of Science** – Software Engineering (2006) West Virginia University, Morgantown WV
1999 to 2003	**Bachelor of Arts** – Computer Science (2003) Fairmont State University, Fairmont WV

Career History

Local Data Solutions, LLC Principal / Lead Architect	2008 to present
CACI (CDC/NIOSH Contract), Morgantown, WV Software Developer 3	2011 to present
SRA International (CDC/NIOSH Contract), Morgantown, WV Software Developer 5	2006 to 2011
Deligo Technologies Software Developer	2005 to 2006
D.N. American Software Developer	2002 to 2005

Additional Skills

- Requirement Analysis
- System Design
- Software Development
- Database Design and Maintenance
- Software Cost Estimation
- Web Based System Design
- Project Management
- .NET and SQL Server Application Development
- Power Shell
- T4 Templates

Parmjit Singh , MS, Principal
Lead Analyst / Senior Software Developer

Profile highlights

- 12+ years of experience in software design, development, and maintenance
- Experience configuring and customizing access to Secure Access Management Services (SAMS)
- Full SDLC (Software Development Lifecycle) experience and training
- Experience designing, developing, and maintaining service oriented application that includes multiple types of clients
- Skilled software developer who works with the latest technologies
- Expert knowledge of AngularJS based client UI/ SPA applications and responsive website design
- Experience with MS SQL Server, ASP.NET, WPF, Entity Framework; Code First Approach
- Experience with LINQ, XML, XSLT, AJAX, XAML, C# and VB.NET technologies/languages.
- Developed Windows/web-based tools for Ag-RISQS, OIICS, WRISQS, CPS, WCOMP and OIICS coding system datasets for DSR Injury Surveillance, NIOSH
- Experienced in translating customer business needs into requirements
- Experienced manager of software teams
- Case management systems development experience

Education

2003 to 2006	**Master of Science** – Industrial Engineering (2006)	
	West Virginia University, Morgantown, WV	
1998 to 2002	**Bachelor of Science** – Computer Science and Engineering (2002)	
	R.E.C Jalandhar, National Institute of Technology, India	

Career History

Local Data Solutions, LLC	2008 to present
Principal / Lead Analyst	
CACI (CDC/NIOSH Contract), Morgantown, WV	2011 to present
Software Developer 3	
SRA International (CDC/NIOSH Contract), Morgantown, WV	2006 to 2011
Software Developer 5	
West Virginia Geological and Economic Survey	2008 to 2009
Software Developer	
West Virginia University, Morgantown, WV	2004 to 2006
Research Assistant	

Additional Skills

- Building web-based applications that allow for secure sharing of electronic Protected Health Information and Personally Identifiable Information in a manner that complies with HIPAA and protects patient privacy
- Requirements analysis
- System, database, and interface design
- Business logic development
- Software development and continuous integration
- Software unit, user interface testing and deployment
- Unit testing and test-driven development
- Hack-proofing ASP.NET web forms and MVC applications
- Design patterns and Object Oriented Design
- T4 Templates and PowerShell integration to generate custom code
- Angularjs 1.5 and 2.0 Javascript framework library
- jQuery, jQueryUI and Knockout JavaScript libraries
- Task Parallel Library (TPL) for parallel programming
- HTML5 and CSS3 constructs understanding
- Implementing Entity Framework Code First, Database First, and Model First approaches
- T-SQL, SQL-92, Visual Basic.NET, C#, ASP.NET, Visual Studio 6.0/2003/2005/2008/2010
- Crystal Reports, MS SQL Server 2000/2005/2008, Microsoft Word, PowerPoint
- Adobe Photoshop CS5.5, Illustrator CS5.5, GIMP, Microsoft Word, Access, and Excel, PHP
- MySQL, Oracle, Sub-version server and client
- Windows Communication Foundation (WCF)
- Understanding Extensibility points in WCF, from the service model, runtime and channel module; and WS-* standards that extend SOAP to make rich integration scenarios

Supporting Staff

John Britton
Senior Software Developer

Profile highlights

- .NET developer with 11 years of experience in developing both ASP.NET and WPF desktop ap
  in a solo or small-team setting
- Able to create standards-compliant and secure web applications.
- Full SDLC (Software Development Lifecycle) experience and training
- Experience designing, developing, and maintaining a service-oriented application that
  includes multiple types of clients
- .NET development (C# and VB), MVC and MVVM design patterns, ASP.NET web forms, VC,
  and Web API, HTML, CSS, JavaScript, jQuery, jQueryUI, and Angular JS, WPF
- Knowledge of iOS, Android, Windows UWP, and Xamarin
- Entity Framework experience
- Knowledge of SQL
- 508-compliance familiarity
- Certification and accreditation experience
- User interface design experience
- Web security experience
- Unit testing and test-driven development
- Technical-writing experience

Education

Bachelor of Science – Computer Science: Software & Computer Systems (2009)

Career History

Local Data Solutions, LLC Senior Software Developer Contractor	2016
CACI/ Emergint/SRA International (CDC/NIOSH Contract), Morgantown, WV Software Engineer	2009 to present

Additional Skills

- Provided analytical support and technical advice during all stages of the software development lifecycle
- Gathered requirements from clients when developing new systems
- Provided timeframe and manpower estimates
- Fulfilled requirements for certification and accreditation of systems
- Performed security analyses of systems and provided solutions
- Provided technical support to clients for applications developed in-house as well as commercial off-the-shelf products
- Responsible for maintaining several different ASP.NET management systems
- Responsible for maintaining an ASP.NET data query system
- Designed, implemented, and maintained an ASP.NET web application that generates tables, charts, and maps from data files
- Designed, implemented, and maintained an ASP.NET content management system for the NIOSH mining website
- Designed, implemented, and maintained a WPF data entry application for NAICS industry coding of work-related injury data
- Converted a radionuclide inventory system from CLIPPER to an ASP.NET web application
- Created a system for collection of citation data for journal articles using Google Scholar
- Responsible for maintaining the CISPro chemical inventory system
- Responsible for maintaining the CERF electronic lab notebook
- Provided analytical support and technical advice during all stages of the software development life cycle
- Gathered requirements from clients when developing new systems
- Provided time frame and manpower estimates
- Fulfilled requirements for certification & accreditation of systems
- Performed security analysis of systems and provided solutions
- Provided technical support to clients for applications developed in-house as well as commercial off-the-shelf products

Matthew R. Young
Senior Software Developer

Profile highlights

- Experienced with multiple technologies and languages, including .NET C#, Java, C++, Visual Basic, JavaScript, HTML, CSS, Xamarin, Android, OpenGL, Subversion, Team Foundation Server, and Entity Framework
- Experienced with Microsoft SQL Server, SQLite, and MySQL platforms
- Experienced with Visual Studio and Eclipse development tools
- Developed, maintained, and supported web-based, mobile, and desktop applications
- Experienced in teaching college-level computer science courses

Education

Master of Science – Computer Science: Mobile Game Development/Computer Graphics on Android
West Virginia University, Morgantown, WV

Bachelor of Science – Computer and Information Technology
Minor in Mathematics
Marshall University, Huntington, WV

Career History

Local Data Solutions, LLC Senior Software Developer Contractor	2016
CACI/ Emergint/SRA International (CDC/NIOSH Contract) Morgantown, WV Software Engineer	2012 to present
West Virginia University, Morgantown, WV Instructor / Graduate Teaching Assistant	2010 to 2012

Adam Phillips
Senior Software Developer

Profile highlights

- Developed web applications for the National Personal Protective Testing Laboratory and the Health Effects Laboratory Division at NIOSH.
- Contributed to all aspects of the software development lifecycle
- Worked with members of government agencies, standard developing organizations, and personal protective equipment manufacturers
- Developed a standard and medical guidance application (https://wwwn.cdc.gov/ppeinfo) using ASP.NET MVC and AngularJS
- Experienced with C#, Java, JavaScript, AngularJS, JQuery, and T-SQL languages and libraries
- Experienced with MS SQL Server and Oracle databases
- IDE and Version Control: Visual Studio, Eclipse, Subversion, GIT, TFS

Education

Bachelor of Science – Computer Science
Bachelor of Science – Computer Engineering
Minor in Business Administration
West Virginia University, Morgantown, WV

Career History

Local Data Solutions, LLC   2016
Senior Software Developer Contractor

CACI/ Emergint/SRA International (CDC/NIOSH Contract)   2013 to present
Morgantown, WV
Software Engineer

Ultra Electronics Prologic Inc., Morgantown, WV
Instructor / Graduate Teaching Assistant   2008 to 2013

Heidi Sprecht Lamb
Lead Designer/Illustrator

Profile highlights

- Produced professional-level artwork, including technical and commercial documentation
- Created deliverables including templates for specific document types, such as brochures and fact sheets, web banners, and illustrations; and data visualization products for online use
- Produced animations and other digital products to enhance NIOSH web presence and brand
- Established design standards, including logo and font usage
- Performed conceptual and visualization work for print and online use
- Maintained relationships with inside and outside creative resources
- Established design workflows with clients to ensure proper feedback
- Developed guidebooks and other documentation regarding use of the deliverables

Education and Certifications

Master of Fine Arts – Visual Design (2002)

West Virginia University, Morgantown, WV

Bachelor of Science – Design and Environmental Analysis

Cornell University, Ithaca, NY

Marketing Strategy Certificate (2015)

Cornell University, Ithaca, NY

Career History

Local Data Solutions, LLC Designer/Illustrator/ Document Specialist Contractor	2016
CACI (CDC/NIOSH Contract), Morgantown, WV Designer/Illustrator/ Document Specialist	2016 to present
WVU Healthcare Director of Marketing	2013 to 2016
WVU Healthcare Manager Marketing Communications	2008 to 2013
WVU Healthcare Manager Visual Design, Lead Visual Designer, Senior Visual Designer	2000 to 2008

Additional Work Experience and Awards

Team Teacher - *School of Art and Design, West Virginia University -* Led team of senior students in design-thinking social services course, September 2015

Freelance Writer - Evolve, Inc. Advertising**,** Greenville, NC
- Script writing for video projects
- Script writing for radio commercials Summer 2015

Awards

32nd Annual Healthcare Advertising Awards (2015)
- Bronze Award – :30 Television Ad – Series, **Patient Voices**

30th Annual Healthcare Advertising Awards
- Merit Award – :30 Television Ad – Single, **Aaron's Acorn**

24th Annual Healthcare Advertising Awards
- Silver Award – Poster, **Advanced Imaging at WVU**
- Silver Award – Website, **Neurosciences Institute**

23rd Annual Healthcare Advertising Awards
- Gold Award – Brochure, **WVU Pediatric Services**

Tracina Jackson
Senior Technical Writer / Document Specialist

Profile highlights

- Technical writer with particular expertise in making specialized, complex subject material accessible to both expert and general audiences
- 12 years of technical writing experience
- Experience determining and documenting software requirements
- Proven ability to work with subject-matter experts (including medical experts, scientists, information-security specialists, programmers, and developers)
- Proven ability to create content, document procedures, analyze systems, conduct extensive research, and suggest workflow improvementsExperienced alpha- and beta-tester for proprietary applications
- Familiar with issues regarding electronic health record confidentiality (current HIPAA Awareness Training certification), information security, federal document management, and plain writing
- Rapidly and thoroughly assimilates new material, from proprietary software to classification systems

Education

Cistercian Fellowship, Graduate School of Medieval Studies
Western Michigan University, Kalamazoo, MI

Bachelor of Arts – Art History
West Virginia University, Morgantown, WV

Bachelor of Fine Arts – Visual Art
West Virginia University, Morgantown, WV

Career History

Local Data Solutions, LLC	2016
Senior Technical Writer Contractor	
CACI/Emergint/SRA International (CDC/NIOSH Contract)	2009 to present
Technical Writer	

Publications

Jackson TM, Fent KW, Musolin K, Methner M. 2014. Simulated smoke, real health effects. Fire Engineering. 167(12):79-82.

de Perio MA, Gibbins JD, Niemeier RT, Jackson TM. 2014. Preventing Campylobacter infection among employees in a poultry-processing plant. National Provisioner. 228(6):38-44.

Eisenberg J, Chen L, Jackson TM. 2014. Reducing lead exposure in aircraft maintenance employees. Aviation Maintenance. 33(6):66-67.

Petrice T, Jackson T, Volkwein J. 2011. PDMMS: A new tool for managing Personal Dust Monitor data. Coal Age. 116(10):18-21.

Appendix A: Proposed Staffing Full Resumes

W. Grant Norman, Ed.D., PMP
Program / Project Manager

Profile highlights

- 10+ years of overall software development management experience
- 10+ years of Program/Project Management Experience – Doctorate in Technology
- 15+ years of commercial, government, and education client work experience
- CMMI Software Process Consulting / Project and Program Management
- 20+ years of software development experience - Masters in Software Engineering
- Collaborative partnership building between clients, management, and staff
- Experienced translating customer needs into established processes
- Project budgeting, planning and management
- Software and IT team building, development and training
- Excellent customer satisfaction reviews
- Presentations, lectures, and teaching at conferences, college and technical levels

Education & Certifications

2003 to 2007	**Doctor of Education in Technology (May 2007)** West Virginia University, Morgantown WV 26505
2001 to 2003	**Masters of Science Software Engineering (Aug 2003)** West Virginia University, Morgantown WV 26505
Renewed thru 2018	**Project Management Professional** PMP # 527104 Certification (2008)

Career History

NETL, DOE – OST, Morgantown/Pittsburgh   2014 - 2016
Infrastructure Manager, ITOMS Contract
- Manage 45+ Staff in MGN/PGH DOE NETL Offices
- Improved processes and management of infrastructure work
- Manage Project Managers & Lead Networks/Systems/Client Services Staff
- Coordinated management with Senior Staff
- Leading staff training and development processes
- Lead efforts on Infrastructure analysis and support
- Working closely with federal Branch Chief and other federal TCORs

West Virginia University, Morgantown, WV   2012 – 2014

Project Manager, OIT, Project Management Office
- Project Manager for eCampus Learn Upgrade
- Co-lead on IT Governance meetings
- Lead PM on PPM Tool project
- Lead PM on Collaborate project
- Lead IT Outreach meetings
- Interacted with PM's managed student worker

CDC/NIOSH, Morgantown, WV   2005-2011
Program Manager - Contractor
- Managed multiple staff and several million dollars of scientific project work for NIOSH
- Coordinated and presented training for software developers, staff, and customers
- Performed all local management, HR, and marketing functions for contracting company
- Attended conferences; prepared and presented various project presentations
- Planning, budget, and financial management
- Presenter at Carnegie Mellon's SEI SEPG Conferences, 2006, 2007

West Virginia University, Morgantown, WV   2006
Adjunct Instructor – Part Time
- Taught CS101 courses – Microsoft Office Products
- Coordinated and developed presentations
- Managed teaching assistant

FBI, Clarksburg, WV   2004 - 2005
Software Project Manager - Contractor
- Managed software development team
- Requirements management planning and system management
- Software process improvement implementation and management
- Customer interaction and requirements planning of $26 million project

ANSER, DOJ Biometrics Projects, Fairmont, WV   2003 - 2004
Program Manager
- Managed software engineers in development of biometrics DOJ projects
- Presentations, training, and implementation of software process improvement
- Managed budget and financials; managed staff from sub-contracting firms

West Virginia University, Morgantown, WV   2002 - 2003

Program Coordinator - Contractor
- Coordinated "5 Day Course in of Biometrics" for DoD project
- Coordinated new online software engineering Master's program
- Assisted department chairman as needed
- Website Development – West Virginia InfraGard

Alderson-Broaddus College, Mollohan Training Center, Philippi, WV   2003
Adjunct Instructor – Part Time
- Developed curriculum and taught "Intro to Front Page" website development
- Developed curriculum and taught "Intro to Business Communications"
- Assisted in student recruitment and retention

State of WV, DHHR, Office of Behavior Health Services, Charleston, WV 2000-2002
Project Lead
- Project management of Medicaid Database
- Created overall full lifecycle software development plan
- Developed curriculum and taught courses in programming, databases, and Object oriented design
- Developed state employees for software development positions

Publications and Presentations

Norman, W.G. (2009) A Grounded Theory of Software Process Model Adoption, VDM Verlag, Germany.

Norman, W.G. (2007, March). Leading change for continued process improvement. Presentation session presented at the (SEPG 2007) Software Engineering Process Group conference, Austin, TX.

Norman, W.G. (2007). A grounded theory of software process improvement model adoption. Doctoral dissertation. West Virginia University, Morgantown, WV.

Norman, W.G. (2006, March). Implementing CMMI in a small organization. Poster session presented at the (SEPG 2006) Software Engineering Process Group conference, Nashville, TN.

Norman, W.G. (2005, August). Implementing the capability maturity model CMM: praise and criticism. 20 November 2003, Denver, CO.

Norman, W.G. (1993, January). Managing activity with a computer. Flooring Magazine.

Ty Petrice

Lead Architect / Software Team Lead / Principal

SUMMARY

I have 13+ years of software development experience. I have an extensive background developing and managing database driven, web based information systems. My experience with software development encompasses the entire software development process including concept, system design, application development and maintenance for web based systems, workstations and client-server environments. I have developed many types of web based systems which include content management, data collection, and process control systems, that are deployed on the CDC network. I am a skilled software developer that works with many of the latest technologies including AngularJS based client UI/ SPA applications, Responsive website design, MS SQL Server, ASP.NET, WPF, Entity Framework - Code First Approach, LINQ, XML, XSLT, AJAX, XAML, C# and VB.NET technologies/languages. I have an in-depth understanding of MS SQL Server and constructing data views that satisfy many complex reporting needs.

EDUCATION

MS, Software Engineering, West Virginia University, 2006
BA, Computer Science, Fairmont State University, 2003

EXPERIENCE

Local Data Solutions, LLC, Software Engineer   **2008 – Present**

- Project Manager/Software Developer responsible for the development, hosting and maintenance of the Newborn Hearing Screening system. This system is a case management system developed for the WVDHHR. This system is designed to automate and simplify many of the tasks related to managing infants with hearing loss or impairment. In addition to managing infants, the system produces annual reports that will be submitted to Center for Disease Control and Prevention (CDC). This system is HIPAA Compliant and meets or exceeds federal IT security requirements.

- Project Manager/Software Developer responsible for the ongoing hosting and maintenance of the Birthscore database application. This system collects child birth information from hospitals across the state of West Virginia. Once the data is collected, it is used to identify and track infants who are at greatest risk for health and developmental problems, and ensuring that these children have access to appropriate health and special care systems. This system is HIPAA Compliant and meets or exceeds federal IT security requirements.

- Project Manager/Software Developer responsible for the design and development of WVU Student Rotations System. The rotations system provides nursing students with logging online patient and activity logs. It also lets faculty manage students, preceptors and site information. The system provides faculty with the ability to run custom reports and statistics. Administrators of the system can manage the application data, submission deadlines, preceptors and sites information.

- Project Manager/Software Developer responsible for building West Virginia Health Careers and Opportunity Programs (HCOP) Website. The HCOP project provides students with online application submission and evaluation surveys for various health career programs. The system provides counselors with the ability to evaluate applications and view statistics. Administrators of the system can manage the application data, submission deadlines and all counselor functionalities.
- Project Manager/Software Developer responsible for designing, developing and maintaining web-based West Virginia Prescription Drug Abuse Quitline. Online survey data collection for WV Prescription Drug Abuse Quitline. This online application written in asp.net using SQL Server database. The application allows a staff member to search for a caller or add a new caller to the system. Once a caller is selected or created, the system provides a selection of surveys to complete. After a survey is selected, the survey guides the user through each question and possible responses. Each response is recorded in a database that lets administrative staff run reports on the database.

CACI, Software Developer 3   **2011 – Present**
- Project Manager, Personal Dust Monitor Management System. This product retrieves data from a Personal Dust Monitor and stores the data in a local database for reporting purposes. Responsibilities include the development, Beta testing and delivering final product to NIOSH. Activities include gathering requirements, implementing features, demonstrating product features with customer, and working with mines involved in the Beta Testing of the product.
- Technical Lead, OAMS Intranet. This product is a web based application that provides a content management system for the OAMS branch. The OAMS Intranet provides information related to Morgantown facility. Responsibilities include requirement analysis, system design, development and development. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, HELD Intranet. This product is a web based application that provides a content management system for the HELD division OD. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, HELD Inhalation Facility website. This product is a web based application that provides a scheduling and information system for the HELD Inhalation Facility. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, iPubs. This product is a web based application that manages publications produced by the HELD division researchers. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.

- Technical Lead, DSHEFS iPubs. This product is another implementation of the iPubs system. The project requires existing DSHEFS publication data imported into a separate iPubs system. Responsibilities include working with customer to resolve data translation into new structure, develop additional functionalities and software maintenance.
- Technical Lead, Facility Database. This product is a web based application that manages facility users at the Morgantown, Cincinnati, and Pittsburgh NIOSH locations. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, OMSHR Website. This product is a web-based Content Management System that is used on the CDC Intranet. The system maintains content that will be used to generate a static HTML website that is published on the Internet. In addition to the static HTML website, the project has a Site Navigator component that uses the CMS database to produce search result lists of links to the static HTML web pages.

SRA International, Inc., Software Developer 5   2006 – 2011
- Project Manager, Personal Dust Monitor Management System. This product retrieves data from a Personal Dust Monitor and stores the data in a local database for reporting purposes. Responsibilities include the development, Beta testing and delivering final product to NIOSH. Activities include gathering requirements, implementing features, demonstrating product features with customer, and working with mines involved in the Beta Testing of the product.
- Technical Lead, OAMS Intranet. This product is a web based application that provides a content management system for the OAMS branch. The OAMS Intranet provides information related to Morgantown facility. Responsibilities include requirement analysis, system design, development and development. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, HELD Intranet. This product is a web based application that provides a content management system for the HELD division OD. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, iPubs. This product is a web based application that manages publications produced by the HELD division researchers. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.
- Technical Lead, DSHEFS iPubs. This product is another implementation of the iPubs system. The project requires existing DSHEFS publication data imported into a separate iPubs system. Responsibilities include working with customer to resolve data translation into new structure, develop additional functionalities and software maintenance.

- Technical Lead, Facility Database. This product is a web based application that manages facility users at the Morgantown, Cincinnati, and Pittsburgh NIOSH locations. Responsibilities include software support services, requirements analysis, software design and development, and software maintenance. Work directly with customer to resolve issues and implement additional features.
- Software Developer, SAMHSA. This product is a web based application that allows counselors to submit survey data electronically. Responsibilities were to develop features according to software requirements.
- Software Developer, Peer Review. This product is a web based application that allows users to manage peer reviewed publications. Responsibilities were to develop features according to software requirements and deploy application.

Deligo Technologies, Software Developer   **2005 – 2006**

- Software Developer, Sun Hydraulics public website. Responsibilities include working with customer to develop new features for the website, such as a shopping cart and credit card processing as well as resolving issues. Other duties included data management on several SQL servers which involved debugging and fixing outdated stored procedures built for an older system but still being used in the new content management system.
- Software Developer, Sun Hydraulics intranet test stand. Responsibilities include working with customer to develop new features and resolve issues.

D.N. American, Jr. Software Engineer   **2002 – 2005**

- Jr Research Engineer, CFD code research. Responsibilities were to develop algorithms that would decompose structured grids used for Computational Flow Dynamics software. The algorithms objectives were to improve the decomposition of the structured grids.
- Jr Software Engineer, SETA. Responsibilities were to help design and build the NASA IV&V website, provide onsite IT support and maintenance for the website and support a custom project management tool developed by D.N. American.

SKILLS

- Requirement Analysis
- System Design
- Software Development
- Database Design and Maintenance
- Software Cost Estimation
- Web-Based System Design
- Project Management
- .NET and SQL Server Application Development
- Power Shell
- T4 Templates

PUBLICATIONS

Petrice, Ty, Tracina Jackson, and Jon Volkwein. "A New Tool for Managing Personal Dust Monitor Data." Coal Age. Coal Age News, 31 Oct. 2011.

Parmjit Singh
Lead Programmer Analyst, Principal

Qualifications Summary

I have 12+ years of experience in software design, development and maintenance. I am skilled in AngularJS based client UI/ SPA applications, responsive website design, MS SQL Server, ASP.NET, WPF, Entity Framework - Code First approach, LINQ, XML, XSLT, AJAX, XAML, C# and VB.NET technologies/languages. I have experience configuring and customizing access to Secure Access Management Services (SAMS), SAMS API, and other single sign-on gateways for sensitive extranet applications authentication and identity verification services. I also have expertise in building N-tier Enterprise Information System (EIS) solutions for rich-client and web applications. I have developed and structured code using various design patterns. I have developed both web and client-server applications with VB/C#/ASP.NET. I have designed, developed, and maintained a service-oriented application that includes multiple types of clients. I have created forms with AngularJS, Bootstrap, and ASP.NET MVC 5 web application that render content with responsive web design. I also have experience designing and implementing platform-independent REST APIs that work on simple, well-established standards designed to support high-performance, massive-scale, secure communication. I have a solid understanding of cryptography in .NET to ensure confidentiality and authenticity of digital data and documents. I have developed the web-based Forensic Information Management System for the West Virginia State Police forensic laboratory; and the Data Mart, SPIROLA, and NIOSH Systems and Databases Inventory System for the National Institute for Occupational Safety and Health (NIOSH), Morgantown, WV. I have also developed Windows- and web-based tools for the Ag-RISQS, OIICS, WRISQS, CPS, WCOMP, and OIICS coding system datasets for the Division of Safety Research Injury Surveillance Team, NIOSH. I have also served as MSDN Academic Alliance Program Administrator for the Department of Industrial Engineering, West Virginia University.

Skills

- Experience building web-based applications that allow for secure sharing of electronic Protected Health Information and Personally Identifiable Information in a manner that complies with HIPAA and protects patient privacy
- Requirements analysis
- System, database, and interface design
- Business logic development
- Software development and continuous integration
- Software unit, user interface testing and deployment
- Extensive knowledge of unit test, mock, test driven development.

- Hack-proofing ASP.NET web forms and MVC applications
- Detailed understanding of design patterns and Object Oriented Design
- T4 Templates and PowerShell integration to generate custom code
- Extensive knowledge of Angularjs 1.5 and 2.0 JavaScript framework library
- Extensive knowledge of jQuery, jQueryUI and Knockout JavaScript libraries
- Expert in using Task Parallel Library (TPL) for parallel programming.
- Good understanding of HTML5 and CSS3 constructs.
- Expert in implementing Entity Framework code first, database first and Model firsts approach.
- T-SQL, SQL-92, Visual Basic.NET, C#, ASP.NET, Visual Studio 6.0/2003/2005/2008/2010
- Crystal Reports, MS SQL Server 2000/2005/2008, Microsoft Word, PowerPoint
- Adobe Photoshop CS5.5, Illustrator CS5.5, GIMP, Microsoft Word, Access, and Excel, PHP
- MySQL, Oracle, Sub-version server and client
- Experience with Windows Communication Foundation (WCF)
- Solid understanding of Extensibility points in WCF, from the service model, runtime and channel module is required. WS-* standards that extend SOAP to make rich integration scenarios.

Work Experience

Local Data Solutions, LLC, Software Engineer　　　　　　　　　**2008 – Present**

- Project Manager/Software Developer responsible for the development, hosting and maintenance of the Newborn Hearing Screening system. This system is a case management system developed for the WVDHHR. This system is designed to automate and simplify many of the tasks related to managing infants with hearing loss or impairment. In addition to managing infants, the system produces annual reports that will be submitted to Center for Disease Control and Prevention (CDC). This system is HIPAA Compliant and meets or exceeds federal IT security requirements.
- Project Manager/Software Developer responsible for the ongoing hosting and maintenance of the Birthscore database application. This system collects child birth information from hospitals across the state of West Virginia. Once the data is collected, it is used to identify and track infants who are at greatest risk for health and developmental problems, and ensuring that these children have access to appropriate health and special care systems. This system is HIPAA Compliant and meets or exceeds federal IT security requirements.

- Project Manager/Software Developer responsible for the design and development of WVU Student Rotations System. The rotations system provides nursing students with logging online patient and activity logs. It also lets faculty manage students, preceptors and site information. The system provides faculty with the ability to run custom reports and statistics. Administrators of the system can manage the application data, submission deadlines, preceptors and sites information.
- Project Manager/Software Developer responsible for building West Virginia Health Careers and Opportunity Programs (HCOP) Website. The HCOP project provides students with online application submission and evaluation surveys for various health career programs. The system provides counselors with the ability to evaluate applications and view statistics. Administrators of the system can manage the application data, submission deadlines and all counselor functionalities.
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CACI Inc., Programmer Analyst, Principal   **2011 - Present**
- Lead developer responsible for building and exposing services (Service-Oriented) based web portal for World Trade Center Health Program, NIOSH
- Lead developer responsible for designing, developing, and maintaining web-based Laboratory Information Management System (LIMS) for Division of Applied Research and Technology (DART), NIOSH
- Division of Respiratory Disease Studies (DRDS) healthcare workers survey for respiratory health project, NIOSH
- Lead developer responsible for the design and implementation of web-based Work-Related Lung Disease Surveillance System (eWoRLD). This system presents up-to-date summary tables, graphs, and figures of occupationally-related respiratory disease surveillance data on the pneumoconiosis, occupational asthma and other airways diseases, and several other respiratory conditions. For many of these diseases, selected data on related exposures are also presented.

West Virginia Geological & Economic Survey, Software Developer   2008 - 2009
- Responsible for developing web-based customer database application that deals with queries related to oil and gas information database
- Responsible for assisting and training other peer employees in current .NET technologies and products
- Installing and managing subversion control software for in-house software packages

Software Engineer, SRA International, Inc., Senior Software Engineer   2006 to 2011
- Responsible for software development in a number of different projects involving both web- and client-server applications, with VB/ASP.NET, XML, XSLT, Custom Control development, SQL SERVER and PHP/MYSQL. I worked as a primary developer on Windows and web-based tools for Ag-RISQS, OIICS, OIICS Coding System, WRISQS, CPS, WCOMP datasets and Data Mart project for DSR IST, NIOSH
- Responsible for data base design, prototyping, requirements analysis, development, documentation, and user-interface design for several projects
- Team Lead for the architecture design of the Spirometry Longitudinal Data Analysis (SPIROLA) Software for DRDS, NIOSH. Responsible for requirements definition, translation of functional requirements into technical design constraints and characteristics, development of alternative solutions to satisfy these requirements, and development of the final system design
- Lead developer responsible for the design and implementation of web-based NIOSH Systems and Databases Inventory system. This system supports statistical analysis by providing a listing to all information associated with different ongoing projects across NIOSH, CDC

West Virginia University, Research Assistant   2004 to 2006
- Project leader for the development and implementation of web-based Forensic Information Management System (FIMS). I designed the database, business logic, and system interface for FIMS. I also developed the "Online Classes" project for electronic distribution of class material for the Department of Industrial Engineering. I developed system-testing scripts and documentation for FIMS, FIMS web interface for hand-held devices (Pocket PC). I also served as a Program Administrator for the MSDN Academic Alliance in the Department of Industrial Engineering.
- Responsible for teaching industrial engineering IENG 331 course, College of Engineering and Mineral Resources, from January 2005 to May 2006.

Professionals Software Developers, Software Developer/ Network Technician   2002 to 2003
- Software developer for wide variety of business software applications for small to medium-sized companies in India. Projects included a Payroll Management System and Inventory Control tool developed with Microsoft Access, SQL, VBA (Visual Basic for Applications) and C++.
- Assisted staff in the usage of application software including Microsoft Office 97/2000 (Word, Access, PowerPoint, FrontPage and Outlook), Adobe Photoshop 7.0, Corel, MS Office and Web-based E-mail clients. I also developed various support scripts, applets and programs in Java, JavaScript and C++ to support functions of departmental web sites. I also provided general technical assistance to web development staff.

Education
- **Master of Science** in Industrial Engineering
  Engineering
  West Virginia University (WV)
  2006

- **Bachelor of Science** in Computer Science and Engineering
  Computer and Information Sciences
  R.E.C Jalandhar, National Institute of Technology, India
  2002

Additional Certifications
- Certificate of Beyond ASP.NET: Enhancing Web Development with .NET 3.5 from DevelopMentor, April. 2009.
- Certificate of Advanced Visual Basic.NET Programming with the .NET 2.0 Framework, from Hands On Technology Transfer, Inc. (HOTT), Sep. 2006.
- Certificate of Software Developer and Network Technician, Professionals Software Developers Pvt. Ltd., Nov 2003.
- Certificate of Excellence for the course of Java and Advance Java, ATEC Computer Education, June 2001.
- Certificate for Industrial Training, ATEC Software Pvt. Ltd, July 2001.
- Certificate of Professional Software Developer, ATEC Software Pvt. Ltd., March 2001.
- Teaching assistant for Computer Applications – Industrial Engineering, IENG 331 course, West Virginia University, College of Engineering and Mineral Resources, Jan, 2005- May, 2006.

Publications

- Jackson LL, Line JR, Singh P, 2009. Integrated Occupational Injury Surveillance Data Dissemination and Resource Tools. Poster presented at 7th Annual Public Health Information Network Conference: Atlanta, GA; August 30–September 3, 2009.
- Jackson LL, Singh P, Line J, 2009. Injury @ work coding resources: occupational injury and illness classification system. Available at http://wwwn.cdc.gov/WISARDS/OIICS.
- Jackson LL, Reichard AA, Line JR, Singh P, 2011. Online access to U.S. employed labor force estimates. Council of State and Territorial Epidemiologists Annual Conference: Pittsburg, PA; June 12-15, 2011.

John Britton
Senior Software Developer

Summary

.NET developer with 11 years of experience in developing both ASP.NET and WPF desktop applications in a solo or small team setting. Able to create standards-compliant and secure web applications. Familiar with the Certification and Accreditation process, 508 compliance, and the CDC IT infrastructure. Able to lead a project through the entire software development lifecycle.

Education

Bachelor of Science in Computer Science: Software & Computer Systems

University of Tennessee at Martin (2005-2009)

Work Experience

SRA International/Emergint Technologies/CACI, Software Engineer   (2009-Present)

- Provided analytical support and technical advice during all stages of the software development life cycle
- Gathered requirements from clients when developing new systems
- Provided time frame and manpower estimates
- Fulfilled requirements for certification & accreditation of systems
- Performed security analysis of systems and provided solutions
- Provided technical support to clients for applications developed in-house as well as COTS products
- Responsible for maintaining several different ASP.NET management systems
- Responsible for maintaining an ASP.NET data query system
- Designed, implemented, and maintained an ASP.NET web application that generates tables, charts, and maps from data files
- Designed, implemented, and maintained an ASP.NET content management system for the NIOSH mining website
- Designed, implemented, and maintained a WPF data entry application for NAICS industry coding of work-related injury data
- Converted a radionuclide inventory system from CLIPPER to an ASP.NET web application
- Created a system for collection of citation data for journal articles using Google Scholar
- Responsible for maintaining the CISPro chemical inventory system
- Responsible for maintaining the CERF electronic lab notebook

University of Tennessee at Martin, Library Systems Developer   (2005-2009)
- Responsible for maintaining the library's PHP/mySQL website and various web applications
- Implemented and maintained the open-source Eprints repository software for Scholarship@UT Martin
- Created numerous data mining applications
- Created a URL validation application for the library website
- Created a system to track website traffic
- Created a web survey application
- Created a web application to manage classes offered at the library
- Created a system to track library statistics

Skills
- .NET development (C# and VB)
- MVC and MVVM design patterns
- ASP.NET web forms, MVC, and Web API
- HTML, CSS, Javascript, jQuery, jQueryUI, and Angular JS
- WPF
- iOS, Android, Windows UWP, and Xamarin
- Entity Framework
- SQL
- 508 compliance
- Certification and Accreditation
- User interface design
- Web security
- Unit testing and test driven development
- Technical writing

Honors
- Chancellor's Award Scholarship (4 Years)
- Honors Program (4 Years)
- Dean's List (5 Semesters)
- Faculty Scholar (2008, 2009)
- Who's Who Among College Students (2008, 2009)
- Outstanding Student in Computer Science and Information Systems 2009

Matthew R. Young
Senior Software Developer

Technical Experience
Technologies/Languages: C#, Java, C++, Visual Basic, JavaScript, HTML, CSS, Xamarin, Android, OpenGL, Subversion, Team Foundation Server, Entity Framework
Database Platforms: Microsoft SQL Server, SQLite, MySQL
Development Tools: Visual Studio, Eclipse

Education
Master of Science in Computer Science, Mobile Game Development/Computer Graphics on Android
West Virginia University**,** Morgantown, WV

Bachelor of Science in Computer and Information Technology
Minor in Mathematics
Marshall University, Huntington, WV

Employment
CACI International, Inc., Systems Programmer II   July 2012 - Present
- Responsibilities include development, maintenance, and support of web-based, mobile, and desktop applications.
- Applications are developed using C#, Java, Xamarin, Visual Basic, ASP.NET, SQL, JavaScript, CSS, and HTML.
- Supported applications are used by the Health Effects Laboratory Division (HELD), Division of Respiratory Disease Studies (DRDS), Office of Mine Safety and Health Research (OHMSR), and the Office of the Director (OD) within the CDC/NIOSH organization.

West Virginia University, Instructor / Graduate Teaching Assistant   August 2010 - May 2012
- Responsible for teaching two sections of Computer Science 101 per semester.
- Duties included designing and delivering lectures, grading assignments, and interacting with students.
- The course content included Microsoft Office fundamentals using Excel, Access, Word, and PowerPoint.

McMillion Research, Web Developer   May 2007 - August 2010

- Primary responsibilities included planning and developing web based surveys using SSI Web, Perl, PHP, JavaScript, HTML, and CSS.
- I was involved in the entire lifecycle of each project which included working with client to establish the survey requirements, working with the quality assurance department prior to client delivery, and managing the project once it had been deployed.
- Additionally, I was responsible for the creation of several internal systems, some in teams of two to three developers.

Marshall University, Teaching Assistant   January 2007 - May 2007

- Responsible for lecturing and assisting with weekly mathematical modeling labs using MatLab, Mathematica, and Stella for IST 231 Analytical Methods IV: Differential Equations and Linear Algebra.

West Virginia Division of Veteran Affairs, Intern   May 2006 - August 2006

- Developed an application using C++ which allows for the digitalization and retrieval of documents used on a daily basis by the Division of Veteran Affairs. The application is also being used to convert Microfilm documents into digital media.

Marshall University, Teaching Assistant   January 2005 - May 2005

- Responsible for grading and providing feedback for programming assignments for Professor Brian Morgan for IST 163: Programming Practicum w/C++.

Heidi Specht Lamb
Lead Designer/Illustrator

EMPLOYMENT

CACI International, Morgantown, WV   Feb 2016 – present
Designer/Illustrator, Lead

Working with key personnel from National Institute for Occupational Safety and Health (NIOSH) and CACI managers, provide branding, graphic, and technical support for a variety of communication products to enhance and support NIOSH brand and information dissemination.

- Produce professional-level art work, including technical and commercial documentation. Deliverables include templates for specific document types including brochures and fact sheets, web banners and illustrations, and data visualization products for online use

- Produce animations and other digital products to enhance NIOSH web presence and brand

- Establish design standards, including logo and font usage

- Perform conceptual and visualization work for print and online use

- Maintain relationships with inside and outside creative resources

- Establish design workflows with clients to ensure proper feedback

- Develop guidebooks/documentation about use of the deliverables

WVU Healthcare, Morgantown, WV

Director of Marketing   Mar 2013 – May 2016
- Directed all major marketing functions of WVU Healthcare (WVU Hospitals, University Health Associates physician practice, and associated centers, institutes, and affiliates). Set priorities and determined strategies and tactics for marketing of healthcare enterprise with 6,000+ employees.
- Guided the activities of communications and marketing professionals involved in messaging and content creation in the areas of writing, design, photography, and video production for internal and external marketing communications. Directed the web content, architecture, and design of WVU Healthcare public websites. Directed WVU Healthcare/WVU Hospitals social media sites including content creation and integration with other initiatives.

- Developed marketing plans and oversaw implementation of television, radio, and online media campaigns including creative direction, production, and media placement. Developed and implemented digital strategies. Successes include notable increase in market share in key services.
- Shaped communication strategies and tactics targeted to internal and external audiences.
- Built and maintained strong relationships within WVU Healthcare and WVU Health Sciences Center to enhance the overall brand of WVU Healthcare. Provided marketing support to WVU's Health Sciences Center, including the five academic schools

Manager of Marketing Communications   Dec 2008 – Mar 2013
- Directed WVU Healthcare marketing and communications initiatives and campaigns including partnership/sponsorship with WVU Athletics.
- Managed the Marketing and Communications design and digital teams including website, social media, and marketing groups.
- Directed the institution's primary sites for healthcare information (wvuhealthcare. com and wvukids.com) including site redesign, conversion to CMS, and healthcare content creation. Provided creative and editorial direction for print and digital publications. Website improvements resulted in marked increase in site traffic.

Manager, Visual Design   Feb 2004 – Dec 2008
- Planned and directed all activities of the design department including print and web units.
- Provided leadership for major projects in the WVU Health Sciences Center Planning, Marketing, and Communications office including development of WVU Healthcare brand.
- Provided art direction and photography for printed and digital publications, advertisements, websites, and internal communications.

Lead Visual Designer   Jan 2001 – Feb 200
- Designed high profile materials for all institutional needs. Contributed to WVUH 2004 local market share increase of 5.7% since 2001.
- Provided ongoing leadership to Health Sciences Center in graphic and visual standards across the three institutional entities.

Senior Visual Designer   Sept 2000 – Dec 2001
- Designed and produced all advertising and marketing communications, including major institutional publications, print and digital advertising, and other communications projects.
- Introduced new digital workflow processes.

Blaine Turner Advertising   June 2000 – Aug 2000
Graphic Designer

- Design of print materials and web sites for full service advertising agency.

ADDITIONAL WORK

Team Teacher
School of Art and Design, West Virginia University
- Led team of senior students in design-thinking social services course September 2015

Freelance Writer
Evolve, Inc. Advertising, Greenville, NC
- Script writing for video projects
- Script writing for radio commercials Summer 2015

Designer/Writer
- Various clients on freelance basis

AWARDS

32nd Annual Healthcare Advertising Awards (2015)
- Bronze Award – :30 Television Ad – Series, Patient Voices

30th Annual Healthcare Advertising Awards
- Merit Award – :30 Television Ad – Single, Aaron's Acorn

24th Annual Healthcare Advertising Awards
- Silver Award – Poster, Advanced Imaging at WVU
- Silver Award – Website, Neurosciences Institute

23rd Annual Healthcare Advertising Awards
- Gold Award – Brochure, WVU Pediatric Services

EDUCATION

Master of Fine Arts in Visual Design
West Virginia University, Morgantown, WV
May 2000

Bachelor of Science in Design and Environmental Analysis
Cornell University, Ithaca, NY

Marketing Strategy Certificate (Completed 10/2015)
Cornell University

Tracina Jackson
Senior Technical Writer / Document Specialist

Qualifications Summary

Technical writer with particular expertise in making specialized, complex subject material accessible to both expert and general audiences. Twelve years of technical writing experience. Experience determining and documenting software requirements. Proven ability to work with subject-matter experts (including medical experts, scientists, information-security specialists, programmers, and developers), create content, document procedures, analyze systems, conduct extensive research, and suggest workflow improvements. Experienced alpha- and beta-tester for proprietary applications. Familiar with issues regarding electronic health record confidentiality (current HIPAA Awareness Training certification), information security, federal document management, and plain writing. Rapidly and thoroughly assimilates new material, from proprietary software to classification systems. Attentive to detail; highly organized and efficient. Familiar with federal government working environment; current NACI clearance.

Work Experience

CACI International   2015-present
Technical Writer, World Trade Center Health Program

Ongoing responsibilities:
- Create documentation and explanatory material (such as data-flow diagrams, information-security documents, user manuals, reference sheets, software requirement specifications, and procedural manuals) for internal and external audiences, in both print and electronic formats, for the World Trade Center Health Program's Information and Systems Technology (IST) team
- Consult with subject-matter experts and perform additional research in order to create documentation
- Consult with clients and programmers to analyze and document system and application requirements
- Perform alpha- and beta-testing for various new applications in development and provide feedback to programmers and developers
- Analyze WTCHP workflows and suggest efficiency improvements
- Review existing documentation; identify issues, create remediation plans, and implement solutions
- Use Team Foundation Server as the platform for IST's Scrum project-management framework
- Maintain confidentiality and security of project records in database
- Create monthly project status reports
- Perform numerous other duties as assigned

Additional projects:

- Wrote six-part training-video script for the Emergency Responder Health Monitoring System Information Manager application

CACI International   2012-2015
Technical Writer/Information Engineer, NIOSH, Division of Safety Research

- Created documentation and explanatory material (such as technical-information documents, user manuals, reference sheets, and data-definition documents) for internal and external audiences, in both print and electronic formats, for the NIOSH Division of Safety Research, Special Studies Team (DSR SST)
- Worked with scientists and researchers to create articles suitable for non-specialist audiences from Health Hazard Evaluations, submitted these articles to be published in industry journals in order to reach affected populations, and acted as point-of-contact between publication editors and scientists
- Created notification-letter templates for workers affected by Health Hazard Evaluations, explaining technical medical subjects for a general audience
- Reviewed existing documentation; identified issues, suggested remedies, and implemented solutions
- Beta-tested the proprietary Industry and Occupation Coding Application, providing feedback for improvement and working with programmers to solve issues
- Performed numerous other duties as assigned

Emergint Technologies, Inc.   2011-2012
Technical Writer/Computer Statistical Assistant, NIOSH, Division of Safety Research

- Created explanatory material and documentation of data-management processes for various projects
- Wrote instruction manual for end-users of proprietary application (Personal Dust Monitor Firmware Certification and Verification Instruction Manual)
- Analyzed data, materials, and procedures; created documentation and reported on findings
- Reviewed existing documentation for various projects; identified issues, suggested remedies, implemented solutions
- Performed research necessary to understand issues underlying the coding of specific variables, and to document coding-recommendation justifications
- Coded and quality-control checked data for NIOSH projects using the Bureau of Labor Statistics' Occupational Injury and Illness Classification System
- Created seed database of employer names, locations, and North American Industry Classification System codes to be used as a coding aid in a proprietary industry and occupation coding application
- Reviewed computer programming code for quality-control aspect of OIICS coding application, identified issues, and worked with programmer to find solutions)
- Performed numerous other duties as assigned

SRA International, Inc.   2009-2011
Computer Statistical Assistant/Technical Writer, NIOSH, Division of Safety Research
- Wrote technical article to client specifications on the Personal Dust Monitor Management Studio, developed by SRA and NIOSH, for major trade publication
- Wrote and edited rule sets in C+ based on 2010 Bureau of Labor Statistics' Occupational Injury and Illness Classification System (BLS OIICS) coding manual to become the architecture for quality-control computer program
- Coded and quality-control checked raw data from the Deepwater Horizon incident for Congressional reports on very short deadlines
- Performed research necessary to understand issues underlying the coding of specific variables in NIOSH's National Electronic Injury Surveillance System—Occupational Supplement project, and to document coding-recommendation justifications
- Coded and quality-control checked data for NIOSH projects using BLS OIICS
- Analyzed, documented, and facilitated the finalization of data that had been backlogged and unfinalized since 2001
- Performed in-depth evaluation of proposed BLS OIICS 2010 coding manual revision on tight deadline. Created reports used as the basis for NIOSH Division of Safety Research's response to BLS
- Within six months of beginning position, thoroughly learned the BLS OIICS and brought a previously backlogged project up to date. Within eighteen months, project was not only current, but so far ahead of schedule that numerous other projects had been added to duties, creating significant additional value for the client

Freelance writer/Independent contractor   2006 – 2007
- Extensively revised high-school online science course text. Rewrote, researched, copyedited, and fact-checked material. Identified potential legal concerns regarding copyright
- Revised three high-school online English course texts
- Used web-based programming and file transfer applications to modify and upload school course material
- Taught high-school English course online

Graduate School of Medieval Studies, WMU   1996 – 1998
Cistercian Fellow
- Wrote and illustrated technical documents for student workers on best-methods practices for conserving, preserving, and restoring rare books and manuscripts
- Created instructional material teaching student workers to catalogue rare books and manuscripts using the specialized library classification system OCLC
- Supervised student workers

Publications External to NIOSH

Jackson TM, Fent KW, Musolin K, Methner M. 2014. Simulated smoke, real health effects. Fire Engineering. 167(12):79-82.

de Perio MA, Gibbins JD, Niemeier RT, Jackson TM. 2014. Preventing Campylobacter infection among employees in a poultry-processing plant. National Provisioner. 228(6):38-44.

Eisenberg J, Chen L, Jackson TM. 2014. Reducing lead exposure in aircraft maintenance employees. Aviation Maintenance. 33(6):66-67.

Petrice T, Jackson T, Volkwein J. 2011. PDMMS: A new tool for managing Personal Dust Monitor data. Coal Age. 116(10):18-21.

Additional Training and Certifications

- World Trade Center Health Project HIPAA Awareness Training, 2015
- National Institute for Occupational Safety and Health, Office of the Chief Information Officer, Security Assessment and Authorization Training for Data Security Officers and Security Stewards, 2015
- Clear Communication Index Training, 2014
- NIOSH Plain Language Training, 2012
- National Center for Health Statistics, Industry and Occupation Coding Fundamentals course, 2010
- Centers for Disease Control and Prevention Security Awareness Training, renewed annually
- Department of Health and Human Services Federal Records Management Training, renewed annually
- NIOSH Division of Safety Research Confidentiality Training, renewed annually

Adam M. Phillips
Software Developer

EMPLOYMENT

CACI, Software Developer   July 2013--present
- Developed web applications for the National Personal Protective Testing Laboratory and the Health Effects Laboratory Division at NIOSH.
- Contributed to all aspects of the software development life cycle
- Worked with members of government agencies, standard developing organizations, and personal protective equipment manufacturers
- Developed a standard and medical guidance application (https://wwwn.cdc.gov/ppeinfo) using ASP.NET MVC and AngularJS

Ultra Electronics ProLogic Inc., Sr. Engineering Scientist   Nov 2008 – July 2013

- Implemented commercial off-the-shelf (COTS) and in-house applications in support of the Department of Energy Office of Legacy Management.
- Contributed to all aspects of the software development life cycle
- Developed web and desktop applications in the ASP.NET Environment using C#, JavaScript, AJAX, XML, CSS, and T-SQL
- Acted as a database administrator in addition to normal responsibilities
- Worked with the Enterprise Architecture team to design new project management workflows.

EDUCATION

Bachelor of Science in Computer Science
Bachelor of Science in Computer Engineering
Minor in Business Administration
West Virginia University, Morgantown, WV

SKILLS AND TRAINING

Languages and Libraries: C#, Java, JavaScript, AngularJS, JQuery, T-SQL

Databases: MS SQL Server, Oracle

IDE and Version Control: Visual Studio, Eclipse, Subversion, GIT, TFS

Training: SQL Server 2005 A Comprehensive Hands-On Introduction, .Net Development with jQuery, Introduction to SharePoint 2010 Development

Appendix B: Copy of Service Level Agreement for Birth Score Database and Newborn Hearing Screening

See next page.

Local Data Solutions

Local focus global reach

Service Level Agreement

Local Data Solutions, LLC
&
West Virginia University Research Corporation

1. About this Service Level Agreement

This document serves as a binding Service Level Agreement ("SLA" or "Agreement") between Local Data Solutions, LLC ("LDS") and the West Virginia University Research Corporation ("WVURC"). The purpose of this SLA is to outline and clarify the requirements, expectations, and communication processes surrounding the information technology needs of the "Birth Score" Program and Newborn Hearing Screening Program administered by the West Virginia University School of Medicine, Department of Pediatrics ("WVU"). Therefore, any modification in the level and/or type of service expectation, supported under the terms of this SLA, must be expressly defined and dually authorized by a written addendum to this document. This SLA governs all activities including service work, upgrades, repairs, and new installations by establishing specific requirements, standards, and protocols for these actions.

2. Term

The term of this SLA is from July 1, 2016 to June 30, 2017, unless terminated in accordance with this Agreement, and it may be renewed for successive one (1) year terms by mutual written agreement.

3. Termination

3.1   Termination For Cause. Any party may terminate this Agreement in the event of a breach of any term of this Agreement by any other party (a) upon receipt of written notice of the breach if the breach is incapable of cure, or (b) upon the expiration of thirty (30) days after receipt of written notice of the breach if the breach is capable of cure and has not been cured.

3.2   Termination Without Cause. Any party shall have the right to terminate this Agreement, without cause or penalty, by providing thirty (30) days advance written notice to the other parties.

4. Supported Environment

The identification of infants who are at greatest risk for health and developmental problems, and ensuring that these children have access to appropriate health and special care systems, are ongoing concerns for state health officials. In this regard, the West Virginia Bureau for Public Health, Office of Maternal, Child and Family Health and WVU have worked collaboratively to develop the Birth Score-Developmental Risk Screen and Newborn Hearing Screen initiatives. This partnership has not only expanded the state's capacity to meet its federally required "child find" responsibilities, but it has also made a significant contribution to the reduction of mortality among West Virginia infants who are one month to one year of age.

On March 14, 1998, the state legislature amended chapter sixteen of the code of West Virginia by adding Articles 22A and 22B. Article 22A requires the testing of newborn infants for hearing loss and requires that physicians or midwives attending a live birth assure that a test for hearing loss is performed. Article 22B authorizes the division of health to establish and implement the birth score program and requires that hospitals, birthing facilities, attending physicians and other persons attending a birth, ensure that a birth score is determined.

5. Local Data Solutions Responsibilities

- LDS will provide technical support services during normal business hours
  - 8am – 5pm Monday - Friday

- LDS will provide after-hours emergency service for system-wide outages twenty-four hours a day, seven days a week. WVU may request Emergency Service at (Service number will be provided), follow prompts for after hour emergency service. All issues not categorized as a High rating of the Local Data Solutions, LLC Service Level Standards will be addressed during normal business hours as outlined in the Service Level Standards. LDS will respond to all technical support requests within the specified timeframe outlined in the Local Data Solutions, LLC Service Level Standards (attached hereto).

- LDS will provide all equipment, software, and associated technical support for all servers and network infrastructure for the web hosting of the Birth Score application and the Newborn Hearing Screening Program application. This includes the web and database servers to host the applications, system backups, and requesting the required security scanning services. Server and infrastructure equipment will be maintained to meet or exceed the West Virginia University Health Sciences Center Information Technology Services (WVU ITS) standards.

- LDS will perform Birth Score website and Newborn Hearing Screening website maintenance. This includes evaluating, diagnosing and repairing any submitted issues, maintaining functionality in supported browsers (IE, Firefox, Chrome and Safari), and running any regularly scheduled tasks to keep the production website running.

- LDS will perform data import maintenance to keep the import features in working order with relation to reasonable changes in data format and structure.

- LDS will perform required database management/maintenance. This includes making reasonable changes to data structure, managing database indexes, statistics, and database performance tuning.

- LDS will maintain application hosting processes and procedures including web server management, DNS management, IP restriction management, application build automation and deployment process management.

- LDS will perform application/ data backups in compliance with WVU ITS standards, policies, and procedures.

- LDS will request required security scanning in compliance with WVU ITS standards, policies, and procedures. LDS shall request regular security scanning at least once per contract year, and in response to any planned major change in the production environment. LDS shall remediate identified issues in a manner acceptable to WVU ITS prior to implementing change into the production environment. LDS shall contact Infosec@mail.wvu.edu with reasonable advance notice to request security scans and assessments.

- LDS will work with WVU ITS to determine a mutually acceptable plan for the transfer of Birth Score data and Newborn Hearing Screening data from WVU ITS to LDS.

- LDS will maintain cyber liability insurance in amounts acceptable to WVU ITS. LDS will provide a certificate of insurance representing such coverage prior to execution of this Agreement, and when requested by WVU. LDS shall notify WVU immediately of any loss, cancellation or change in such coverage.

- LDS will provide end-user support including user account management.

- LDS shall ensure that any individual with access to the Birth Score data or Newborn Hearing Screening data maintains the privacy and security of the data and refrains from any disclosure of the data except as permitted under this Agreement or as required by law. LDS shall ensure that each individual with access to the Birth Score data or Newborn Hearing Screening data has been appropriately trained to maintain the confidentiality of the Birth Score data and Newborn Hearing Screening data. LDS shall notify WVU immediately of any suspected breach or impermissible disclosure of the Birth Score data or Newborn Hearing Screening data, and shall take all reasonable steps requested by WVU or its agents to address such breach.

6. Data Ownership and Export Requirements

To the extent applicable, WVU reserves all rights and ownership of the WVU / DHHR data, application code and all content contained within the applications supporting the WVUSM Pediatrics department.

- If requested by WVU, LDS will provide such data to WVU in a commonly used format per specifications noted below and shall not be in a proprietary or otherwise inaccessible format. The requested information will be provided to WVU, or to an entity appointed by WVU, within 10 days of written request from WVU. Cost of data export(s) will be at no additional fee to WVU.
- Upon termination or non-renewal of this Agreement, and upon verification of data validity by WVU, LDS will destroy any existing copies of data from their servers.
- Any request of data transfer must originate from the WVU or its authorized agent in writing.
- After receiving an authorized data transfer request, an agent of Local Data Solutions will verify the request.
- On successful independent verification, data transfer will be permitted only on a 256-bit Hardware-based encrypted, password protected media (Local Data Solutions will provide the media).
- Data will be provided according to data export specification with required credentials to successfully read/process data transfer from 256-bit Hardware-based encrypted, password protected media to the destination on WVU network.
- On successful completion of data transfer, authorized agent of WVURC must sign acknowledgment of successful data transfer. A copy of the acknowledgement will be provided by Local Data Solutions.

- On completion, the data on the media will be destroyed by the agent of Local Data Solutions in presence of the agent of WVU.
- Data export specification:
  - The database(s) containing all WVUSM Pediatrics data and lookup tables should be available in one of the following formats upon request:
    - Microsoft SQL Server backup file (bak)
    - Microsoft SQL Server Bacpac file (bacpac)
  - The database backups should be unencrypted and readable on a standard SQL Server with no external dependencies.

7. <u>Audit and Inspection Rights</u>

- LDS will keep accurate and complete records and accounts pertaining to the performance of the services under the SLA. Upon no less than seven (7) days' written notice, and no more than once per calendar year, WVU may audit and inspect, or nominate a reputable agent to audit and inspect, LDS's equipment, software, and associated technical records and accounts relating to its performance hereunder during the term of this Agreement and for a period of three (3) months thereafter.

8. <u>Payment</u>

- For complete performance under this Agreement, WVURC agrees to pay Local Data Solutions ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ (▓▓▓▓▓▓) this fee includes the maintenance, support, security, and backups contemplated in this SLA.
- Additional Development to the Birth Score application and Newborn Hearing Screening application will be billed at $100.00 per hour. LDS must receive prior written permission from WVURC before performing additional work.
- LDS shall invoice WVURC quarterly, and WVURC shall pay such invoices within thirty (30) days of receipt.

9. <u>Problem Reporting</u>

Any issues, questions, or concerns related to the services provided under this SLA should be directed to the appropriate contact at Local Data Solutions. Reference the table below:

Name:	Contact Info:
Ty Petrice Project Manager	Phone: (304) 641-1767 Email: ty@localdatasolutions.com
Parmjit Singh Technical Lead	Phone: (304) 906-8449 Email: psingh@localdatasolutions.com
Eric Knutsen Business Manager	Phone: (304) 376-2398 Email: eric@localdatasolutions.com

Any legal notices required under this Agreement should be directed to the appropriate contact below:

WVU: West Virginia University Research Corporation
                        P.O. Box 6845
                        Morgantown, WV 26506-6845

With a copy to: Office of Legal Services
                        West Virginia University
                        P.O. Box 6204
                        Morgantown, WV 26506-6204

Local Data Solutions: Project Manager
                        Local Data Solutions, LLC
                        217 Vermont Avenue
                        Clarksburg, WV 26301

10. No Exclusive Arrangement

Nothing contained herein shall be construed as creating an exclusive arrangement between the parties with respect to any of the services provided by Local Data Solutions hereunder. WVURC may obtain similar services from others and Local Data Solutions.

11. Independent Contractor

It is expressly acknowledged that the parties are "independent contractors". Nothing contained in this Agreement is intended or shall be construed to create an employer-employee relationship, a joint venture relationship or a lease or landlord-tenant relationship between Local Data Solutions and DHHR.

12. Non-Discrimination

The parties shall not discriminate on the basis of race, sex, age, disability, veteran status, religion, sexual orientation, color, or national origin in any of the services provided hereunder. The parties shall not affiliate knowingly with nor grant recognition to any individual, group, or organization having policies that discriminate on the basis of race, sex, age, disability, veteran status, religion, sexual orientation, color, or national origin, as defined by the applicable laws and regulations.

13. Applicable Law

This Agreement shall be governed by and construed in accordance with the laws of the State of West Virginia.

14. Amendments and Modification

Any amendment to or modification of this Agreement shall be in writing and signed by the parties hereto and dated as of the effective date thereof.
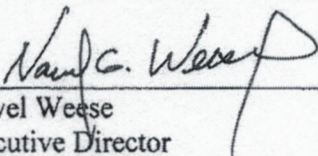
15. Delivery of Signatures

The Parties agree that the delivery of signatures on this Agreement by fax, e-mail, or other electronic media shall be valid and binding for all purposes.

16. Signature Page

This Service Level Agreement has been read and accepted by authorized representatives of Local Data Solutions, LLC and West Virginia University Research Corporation (WVURC).
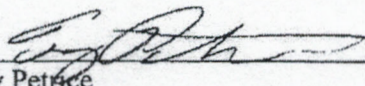
WEST VIRGINIA UNIVERSITY RESEARCH CORPORATION

Narvel Weese
Executive Director

7-13-16
Date

LOCAL DATA SOLUTIONS, LLC

Ty Petrice
Project Manager

7/12/2016
Date

Service Level Standards for the WV DHHR Birth Score Program

Service Level	Service Level Details	Response Time	Resolution Time
	Severity: - Severe Business or Process Hinderance **Examples:** - Production environment not available - Data not being captured in system for unknown reasons. **Scope of Impact:** - Significant Number of Users	**Within 30 minutes**	**Within 1 hour**
Moderate	**Severity:** - Slowing of Normal Business or Process Productivity, But Not Stopping the Overall System Functions. **Examples:** - Report or System Running Slowly - User Access Issues with Interal Administrators Unable to Resolve. **Scope of Impact:** - Multiple Users or Multiple Locations	**Within 1 Hour**	**Within 1 day**
Low	**Severity:** - Slight Impact on Normal Functions **Examples:** - Erroneous Text or Label on a report - Unreproducable bug from a single user needing more Investigation. **Scope of Impact:** Single or Small Number of Users	**Within 1 Day**	**Within 2 days**

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 exceed 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: _Local Data Solutions_

Authorized Signature: _____ Date: _8/9/2016_

State of _West Virginia_

County of _Monongalic_ , to-wit:

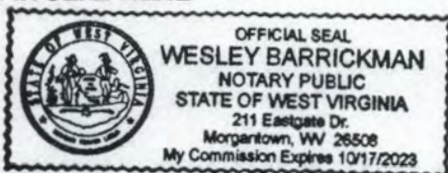Taken, subscribed, and sworn to before me this _9th_ day of _August_ , 20_16_.

My Commission expires _10/17/2023_ , 20___.

AFFIX SEAL HERE

NOTARY PUBLIC _____

OFFICIAL SEAL
WESLEY BARRICKMAN
NOTARY PUBLIC
STATE OF WEST VIRGINIA
211 Eastgate Dr.
Morgantown, WV 26508
My Commission Expires 10/17/2023

Purchasing Affidavit (Revised 08/01/2015)

Contract Item#	Description	Quantity	Unit Price	Extended Price
4.1.2	Conceptual Design of web-based performance and case management system to support the coordination and integration of information and services for CYSHCN (Month 1).	1	$ 32,206	$ 32,200
4.1.3	Written Design of Web-Based Data Collection System (Months 1-2).	1	$ 37,200	$ 37,200
4.1.4	Development of Web Based Data Collection System (Months 2-5).	1	$ 566,500	$ 566,500
4.1.5	Training (Months 6-8).	1	$ 48,000	$ 48,000
4.1.6	Go-Live for CYSHCN (Month 9)	1	$ 30,000	$ 30,000
4.1.7	Maintenance, Support and Upgrades (Year 1)	1	$ 440,600	$ 440,600
4.1.8	Maintenance, Support and Upgrades (Year 2)*	1	$ 440,600	$ 440,600
4.1.9	Maintenance, Support and Upgrades (Year 3)*	1	$ 440,600	$ 440,600
4.1.10	Maintenance, Support and Upgrades (Year 4)*	1	$ 440,600	$ 440,600

		Grand Total Price	$ _2,476,300_

*Contract will be issued for only the Year one (1) costs. Optional contract renewals for Maintenance, Support, and Upgrades for Year two (Y2), Year three (Y3), and Year four (Y4) will be included in the Grand Total Price cost for bid evaluation only and will be added annually by Change Order upon mutual agreement between the Agency and the successful bidder.

Contract will be awarded to the Vendor that provides the Contract Items meeting the required specifications for the lowest overall Total Bid Amount.

Delivery of orders will be F.O.B. Destination.

Vendor Name:

Local Data Solutions

Physical Address:

144 Scenery Dr.
Morgantown, WV 26505

Remit to Address:

Telephone:

_(304) 641-1767_

Fax:

Email:

ty@localdatasolutions.com

Vendor Representative (print name):

Ty Petrice

Signature: _[signature]_   **Date:** _8/10/2016_

Purchasing Divison 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	State of West Virginia Request for Quotation 21 — Info Technology

Proc Folder: 170611

Doc Description: ADDENDUM_2 Web-based, performance & case management system

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2016-07-19	2016-07-28 13:30:00	CRFQ 0506 MCH1600000003	3

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:

FOR INFORMATION CONTACT THE BUYER

Mark A Atkins

(304) 558-2307

mark.a.atkins@wv.gov

Signature X _(signature)_   FEIN # 26-2017671   DATE 8/10/2016

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

FORM ID : WV-PRC-CRFQ-001

ADDENDUM_2: Is issued to publish the vendor technical questions received with the agency responses.

NO OTHER CHANGES

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	World wide web WWW site design services	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description :

4.1.2 Conceptual design of web-based performance and case management system to support the coordination and integration of information and services for CYSHCN (Month 1).

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	World wide web WWW site design services	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description :

4.1.3 Written Design of Web-Based Data Collection System (Months 1-2).

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	World wide web WWW site design services	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description :

4.1.4 Development of Web-Based Data Collection System (Months 2-5).

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
4	Training workshop services	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
86132201			

Extended Description :

4.1.5 Training (Months 6-8).

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
5	World wide web WWW site design services	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112103			

Extended Description :

4.1.6 Go-Live for CYSHCN (Month 9).

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
6	Maintenance or support fees (Y1)	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :

4.1.7 Maintenance, Support, and Upgrades (Year 1)

INVOICE TO	SHIP TO
PURCHASING DIRECTOR - 304-356-4095	PURCHASING DIRECTOR - 304-356-4095
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
BPH - MATERNAL & CHILD HEALTH	BPH/MCH - HANDICAPPED CHILDREN
350 CAPITOL ST, RM 427	350 CAPITOL ST, RM 427
CHARLESTON WV 25301-3714	CHARLESTON WV 25301-3714
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
7	Maintenance or support fees (Y2)	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :

4.1.8 Maintenance, Support, and Upgrades (Year 2)

INVOICE TO		SHIP TO	
PURCHASING DIRECTOR - 304-356-4095		PURCHASING DIRECTOR - 304-356-4095	
HEALTH AND HUMAN RESOURCES		HEALTH AND HUMAN RESOURCES	
BPH - MATERNAL & CHILD HEALTH		BPH/MCH - HANDICAPPED CHILDREN	
350 CAPITOL ST, RM 427		350 CAPITOL ST, RM 427	
CHARLESTON	WV 25301-3714	CHARLESTON	WV 25301-3714
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
8	Maintenance or support fees (Y3)	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :
4.1.9 Maintenance, Support, and Upgrades (Year 3)

INVOICE TO		SHIP TO	
PURCHASING DIRECTOR - 304-356-4095		PURCHASING DIRECTOR - 304-356-4095	
HEALTH AND HUMAN RESOURCES		HEALTH AND HUMAN RESOURCES	
BPH - MATERNAL & CHILD HEALTH		BPH/MCH - HANDICAPPED CHILDREN	
350 CAPITOL ST, RM 427		350 CAPITOL ST, RM 427	
CHARLESTON	WV 25301-3714	CHARLESTON	WV 25301-3714
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
9	Maintenance or support fees (Y4)	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
81112201			

Extended Description :
4.1.10 Maintenance, Support, and Upgrades (Year 4)

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical Questions due by 4:00 pm EST	2016-06-28

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

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:

1. Change bid opening date from July 14, 2016 @ 1:30 pm EST to July 28, 2016 @ 1:30 pm EST to allow for more time to prepare and publish responses to vendor questions.

No other changes made.

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.

ATTACHMENT A

NO ATTACHMENTS FOR THIS ADDENDUM_1

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MCH1600000003

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)

[X] Addendum No. 1   [ ] Addendum No. 6

[X] Addendum No. 2   [ ] Addendum No. 7

[X] Addendum No. 3   [ ] Addendum No. 8

[ ] Addendum No. 4   [ ] Addendum No. 9

[ ] Addendum No. 5   [ ] 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.

Local Data Solutions
Company

(signature)
Authorized Signature

8/10/2016
Date

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

SOLICITATION NUMBER: CRFQ MCH1600000003
Addendum Number: 2

The purpose of this addendum is to modify the solicitation identified as CRFQ 0506 MCH1600000003 ("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:

1. Attachment of Vendor questions and Responses.

No other changes made.

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.

Questions	Answers
4.1.1.1 Software must track and allow users to access service deliverables. 1. Does this mean that users should be able to view services already delivered? 2. Services which have been ordered..? 3. To identify and order available services? 4. Or does it refer to something else? *Please clarify. An example would be helpful. 5. How many individual users of the system are anticipated?	1. Yes- the users should be able to view Services which already delivered, i.e. service history. 2. Yes 3. Yes- users should be able to identify and order available services. 4. The system must be able to track previously received services (for example, care coordination services, client contacts, and medical foods authorizations). It must also be able to set and schedule reminders for future services. 5. Approximately 50 primary users, with limited user profiles for clients/families and primary care physicians.
4.1.1.10 Software must have the ability to accept batch uploads for all data elements within the system. 1. Please identify the systems and interfaces with which the system is to exchange data initially and on an ongoing basis.	1. WEHC – DHHR mainframe application; Families and Children Tracking System (FACTS) – statewide automated information system established by the WVDHHR for the administration of Title IV-E Child Welfare Programs; West Virginia Medicaid Management Information System
4.1.1.11 Software must record communications among integrated medical homes. 1. Please clarify this requirement. An example would be helpful.	1. The system must be able to track contacts between members of the client's medical home (CSHCN Program care coordinators, the client/family, the primary care physician, medical specialists, therapists, the education system, vendors, etc.).
4.1.1.17 Software must record data on emergency room and urgent care center utilization. **4.1.1.18** Software must record data on physician visits, including both well-child and acute care visits. **4.1.1 19** Software must maintain CSHCN Program clinical services data regarding scheduling, clinic outcomes, appointment outcomes and reason(s) for cancellation. 1. Please identify/describe the data to be tracked for these encounters.	1. Appointment dates and times, primary care physician visits and type (well-child, acute), specialty medical appointments, CSHCN and community clinic appointments, outcomes (hospital admission/discharge, cancellation and attendance).
4.1.1.27 Software must enable the Title V Agency to create ad-hoc reports and must include licensing for ad-hoc report creation and publishing. 1. Please identify the reporting applications currently licensed/used by the Agency.	1. Reports are currently generated by DHHR Management Information System (MIS) and by the CSHCN Program epidemiologist using a .csv download and create reports in Microsoft Excel and Access.
4.1 1.32 Software must include an open web services based application programming interface (API) to facilitate data integration using Simple Object	1. At this time, the CSHCN Program does not want to create its own interfaces.

Questions	Answers
Access Protocol (SOAP) standards. 1. Would Agency state administrators want to create interfaces on their own without relying on an outside vendor?	
4 1.1.37 Batch import must allow for multiple search criteria simultaneously, including but not limited to the following: • Wildcard search capabilities (in case of misspelling of names); • DOB: Date of Birth; • Name (first, middle, and last); and • Geographic location. 1. Please describe how searches are to be used in the context of batch import. An example would be helpful.	1. The searches would allow for the batch import to be matched to the data currently in the system, as well as to allow users to find specific records and navigate through specific records after the data is imported to find relevant/needed information.
4.1.1.38 Software must generate reminders for well child visits due based on calculation of age and previous appointment dates. 1. Please provide the algorithm(s).	1. See American Academy of Pediatrics/Bright Futures periodicity schedule for well-child exams. This information can be found at: https://www.aap.org/en-us/Documents/periodicity_schedule.pdf
4.1.1.45 Software must set alerts based on defined formulas calculated using dates or manually entered ones. 1. Please provide the algorithm(s).	Please see the attached Business Requirements Document pages 17-25.
4.1.3 Written Design of Web-Based Data Collection System (31 – 60 calendar days after contract start date). 4.1.4 Development of Web-Based Data Collection System (61 – 150 calendar days after contract start date). 1. Please clarify how these requirements apply to a COTS system.	1. Vendor does not have to provide a commercial off-the shelf (COTS) solution. If vendor provides COTS solution, these timeframes will be utilized to write the "glue code" that 1) references the interfaces in the COTS software component; 2) interprets return codes from these interfaces; and 3) converts (as necessary) data and other information from the format in which the system maintains data to the format required by the COTS component.
4.1.9.3 Vendor will provide access for all registered users to web-based software trainings offered no less than weekly for the duration of the contract. 4.1.10.3 Vendor will provide access for all registered users to web based software trainings offered no less than weekly for the duration of the contract. 1. Are these weekly sessions expected to be formal trainings, or more in the way of an available support call, with training, when and if needed?	1. Formal trainings are required. Vendor will provide live, toll-free support (Monday through Friday from 8:00am to 8:00pm EST) to all authorized users throughout the life of the contract.
5.1 1. At what point after contract award	1. Upon Award

Questions   Answers

Questions	Answers
does the 274 day contract period begin?	
5.1 1. According to this document, the Development period is expected to terminate 150 days after contract award. If the contract period begins upon contract award, does the Agency intend that first year live operations will only be 124 days? 2. Are the payment files received by the system standard 835 files? If not, what format do they use?	1. Yes 2. Yes - WV Medicaid encourages all providers to receive and make use of the standard HIPAA 835 Healthcare claim payment advice.
5.1 Contract Award Vendor must provide documentation of an executed contract as proof of experience in the delivering and supporting of a performance and case management system currently in operation for at least one (1) State, specific to care coordination for children with specialized health care needs. 1. Does a vendor submitting a proposal required to be a prime contractor with another state with a current case management project similar to the care coordination for children with specialized needs, or can vendor be a subcontractor on a larger state project that includes providing care coordination and still meet this documentation requirement?	1. Yes, the vendor can be a prime contractor with another state or a subcontractor on a larger state project so long as the vendor is able to demonstrate providing a similar product to at least one other state.
3.1 Would a state agency such as State University Healthcare System using our company's solution meet this requirement?	Yes, if the company's solution meets the minimum standards
4.1.1.3 What is the file format that will be required to submit Title V Agency and Federal reports?	Microsoft Word
4.1.1.4 Do you already have care plans that are created or are industry standards that will be used within the application?	Yes, we will be supplying the vendor with a best practice example of the care plan to be incorporated into the system.
4.1.1.6 Can you give you more details on requirements on interfacing this ApplicationXtender?	The system must be able to link to the client's records stored in ApplicationXtender. There would be no requirement to directly send or receive data other than that required to match/link the records.
4.1.1.17 How would you receive this data? What type of data elements will be recorded?	If possible, this information would be received from West Virginia Medicaid's Management Information System, but the ability to be entered by a system user would also be required. Data may include (but will not be limited to): appointment dates and times, outcomes (hospital admission/discharge, attendance, etc.).
4.1.1.22 What type of access would the	Clients and their families will have limited access (read-only access

Questions	Answers
family need? Please give more details around this requirement.	to a portion of their record and limited write access to add case comments/contacts and fill certain forms/surveys).
4.1.1.32 Please describe more details around what purpose would require this? Would taking data inbound be sufficient?	This requirement is based upon the high need for transactional reliability. System must provide standard implementation of data integrity, data privacy and reliable messaging. No
4.1.1.39 Please explain this requirement.	The system must have the capability to link one record (i.e. the client's) to other records (i.e. family members) to allow for easy navigation between related records.
Section 4.1.1.44- Please give more details regarding "transactions".	Transactions include billing data for any Title V funded services. The system must have the capability to track authorization data, such as: the date of service, start, end, and termination dates, total cost of service, total units authorized, HCPCS code, product provided, vender, etc. The system must also have the ability to track financial transactions to providers for clinical services rendered, such as: date of service, amount, service provided, service provider.
4.1.1.3 - requests a "file generation tool" to submit required Title V and Federal reports. Please clarify if OMCFH is looking for the ability to run and/or print the reports or a solution that automates the submission of the final report (interface with federal or other system).	OMCFH is not looking to automate its federal reporting requirements. The OMCFH is looking for a solution that provides the ability to run and/or print the reports. At this time, OMCFH is not looking for a solution that automates the submission of the final report (interface with federal or other system).
To ensure that we properly plan to deliver all the reports you are expecting, please individually list all Title V Agency and any other federal reports that should be included as part of the initial software configuration during implementation. Can OMCFH provide samples of the report templates?	Five-year Needs Assessment Summary Yearly MCH Block Grant Applications/Annual Reports Using both quantitative and qualitative methods we must present an overview of the health status of the state's CSHCN population. o Yes https://www.wvdhhr.org/mcfh/blockgrant/WV_Narratives_2014.pdf https://www.wvdhhr.org/mcfh/blockgrant/WV_Needs2010.pdf
For requirement 4.1.1.24 Software must allow the Title V Agency to extract data for ad hoc data analysis and reporting in other programs (Microsoft Excel, Microsoft Access, SAS, Stata, and IBM SPSS), do you plan to use all of these applications? If data can be exported in standard file types such as Excel and CSV, will that be sufficient for manipulating and importing data into other tools for further data analysis?	o No, but we need to ensure we can utilize the programs that we have available and with which data analytics staff are familiar. o Yes, provided those programs have the capability to import Excel and CSV files.
For requirement 4.1.1.11 Software must record communications among integrated medical homes, can you explain what is meant by integrated medical homes and how they work together? What types of communications should be recorded?	o The integrated medical home includes all members of the client's medical team, service providers, and community supports. The system must have the capability to document these interactions, as facilitated by the OMCFH care coordination teams. o This would be in the form of case comments/contacts recorded

Questions	Answers
	by all members of the medical home with access to the system (client/family, care coordination team members, the primary care physician).
Could OMCFH tell us more about the current use of ApplicationXtender? ○ Examples of the types of documents stored ○ Volume of documents stored (approx. number of forms per client)? ○ Does OMCFH envision using ApplicationXtender any differently in the future?	Examples of the types of documents stored ○ Scanned PDF documents of medical records, service authorizations, assessments, care plans, eligibility determinations, etc. Volume of documents stored (approx. number of forms per client)? ○ These can range anywhere from a few pages to 1,000+ pages. It largely depends on the length of service and the level of need of the client. Does OMCFH envision using ApplicationXtender any differently in the future? ○ No, ApplicationXtender will be used as a document repository for medical records. Additional search and other features may be added, but the function will not change.
For the integration with ApplicationXtender, please provide a use case for how staff would interact with the new system and ApplicationXtender as an integrated solution. This will help us determine how the integration should work and what fields in our solution need to interact with ApplicationXtender.	The system must be able to link to the client's records stored in ApplicationXtender (link by unique CSHCN ID number, though matching by name may be required in some instances). The OMCFH care coordination team should be able to access (or have access to a link directly to) the client's records in ApplicationXtender while in the client's case in the system. There would be no requirement to directly send or receive data other than that required to match/link the records.
For Requirement 4.1.1.7 to accept batch uploads from other DHHR systems: ○ Please confirm if OMCFH is asking for a manual batch upload of data from Excel/CSV files or a more automated solution with scheduled uploads? ○ What file formats can MMIS and the other systems produce? ○ What type(s) of eligibility codes might be available on the MMIS/DHHR Medicaid enrollment data exports that can be matched up with CSHSCN participants? ○ How many rows and columns of data are expected	○ Either a process for manual upload or an automated solution ○ -ASCII delimited files, EDI HIPAA transactions ○ Medicaid and foster care identifiers; Rate Code= T99 that maps to Coverage Code: CSC (Handicapped Children) ○ The current report we receive includes 14 columns of data. There are approximately 30 rows per month, though it varies.
For Requirement 4.1.1.37, is OMCFH asking about the ability to batch import client information from another source into the solution or referring to the system's search capabilities to find a client record? ○ If yes, are the requirements for wildcard search, DOB, name, and geographic location intended to validate a match with the correct client in the system? ○ The Business Requirements document outlines an interface with Molina for	○ This requirement is specifically regarding matching batch import data to the appropriate record in the system. ○ Yes, the intent is to validate a match with the correct client in the system ○ An automated solution would be preferred, however based on differences in systems and compatibility a manual batch upload (Excel or CSV) would meet this requirement. ○ Yes, Molina can exchange data via secure FTP. Yes, Molina can integrate with other systems via API. ○ The current report we receive includes 14 columns of data. There are approximately 30 rows per month, though it varies. ○ When a Medicaid match, 35-40 days from the date of service

Questions	Answers
payment tracking. Would a process to manually batch upload files from Excel or CSV files serve this need or is an automated solution for scheduled uploads needed? ○ If an automated solution is desired, can Molina either exchange data via secure FTP or integrate with other systems via API? ○ How many columns and rows are expected per load? • What is the typical delay from the date of service to the day of payment processing within the Molina system?	

Please provide more information about the desired Data Migration.
○ Please provide details on the volume of data to be migrated.
   ○ How many individual client records?
   ○ How many total columns (fields) and rows of data?
○ What format will the data be in? Can it be Excel or CSV files?
○ How clean is the data? Is OMCFH able to assist with data cleaning prior to upload?
	○ Approximately 4000 records
	○ Our primary data system contains 66 columns of data. There could be upwards of 28,000 rows depending on the number of diagnoses the client has in the system
	○ Source data will be in Excel format. Source data can be delivered via CSV files as well.
	○ Source data will need to be cleaned, i.e. profiled. CSHCN staff will assist with data cleaning prior to upload.

Our solution has a program structure. We typically define a program as a set of services/activities, delivered by a cohesive set of staff intended for a specific target population for the purpose of achieving specific outcomes. Each program get a focused requirements gathering meeting, blueprint chapter, testing, and training because each program typically has its own goals for using the system, business rules, data entry needs, and reporting requirements. In other similar projects we have defined the following programs: Intake/Eligibility, Core Care Coordination Services, Home Care, and Service Provider Management. Based on our program definition, does this list look correct and does OMCFH have any other distinct programs?	○ No - This list is not inclusive of all the functions that the OMCFH would require. The OMCFH would not utilize the home care. The OMCFH does provide funding for specialty services (such as medical foods and specialty clinics) that would need to be tracked through the system, in addition to the others listed. This system will not be used as a billing system, simply as a data repository for tracking purposes. ○ Yes - specialty services/medical foods and specialty clinics
What data elements from physician, therapists and other medical practitioners is OMCFH interested in having input into the new system?	This information would include scheduled appointment dates and times, appointment outcomes (attended, cancelled, etc.), treatments provided/recommended/prescribed. Most of this information would be input by the OMCFH care coordination team.

Questions	Answers
Instructions to Bidders document indicates that failure to comply with any provision marked as mandatory in the solicitation will result in bid disqualification. Just wanted to confirm that a vendor's inability to comply with any of the requirements in Section 4. Mandatory Requirements in the Specifications document would result in bid disqualification.	This is correct, it would result in disqualification.
Whether companies from Outside USA can apply for this? (like from India or Canada)	Yes – if they can meet the vendor requirements stated in 3.1.
Whether we need to come over there for meetings?	Yes – the RFQ clearly states (4.1.2.1) that the [vendor] will attend and participate in a meeting at OMCFH located at 350 Capitol Street, Charleston, West Virginia 25301 to develop a conceptual design."
Can we perform the tasks (related to RFP) outside USA? (like from India or Canada)	Yes – if all requirements stated in the RFQ can be met, including attendance at the conceptual design meeting and all stated maintenance, support, and upgrades (for example, 4.1.7.1 stating live-toll free support must be provided from 8:00 am to 8:00 pm EST).
Can we submit the proposals via email?	The Purchasing Division will not accept bids, modification of bids, or addendum acknowledgment forms by e-mail transmission. Acceptable delivery methods include hand-delivery, delivery by courier or facsimile.
4.1.1.3 - Software must include a file generation tool which will allow OMCFH to submit required Title V Agency and Federal reports. • What are the Title V Agency and Federal Reports?	Five-year Needs Assessment Summary Yearly MCH Block Grant Applications/Annual Reports Using both quantitative and qualitative methods we must present an overview of the health status of the state's CSHCN population.
4.1.1.6 – Software must be able to interface with ApplicationXtender®. • In what capacity ApplicationXtender is deployed? • Is SOAP based web service interface deployed and available for development and testing?	• ApplicationXtender is utilized as a document management system for the client's medical records. • No
4.1.1.11 - Software must record communications among integrated medical homes. • Can you define medical homes? • Can you provide the expected number of medical homes?	A medical home is both an approach to providing comprehensive primary care and a health care setting that facilitates partnerships between children and youth with special health care needs (CYSHCN), their families (as appropriate), personal physician(s) and, when appropriate, their communities. A medical home is ready and willing to provide well, acute and chronic care for all children and youth, including those affected by special health care needs or who hold other risks for compromised health and wellness. The medical home is widely identified as the standard of care for CYSHCN. The medical home, comprised of a primary care provider and/or pediatric subspecialist and as part of an integrated care team, does

Questions	Answers
	the following: • Provides health care services that encourage the family to share in decision making; • Promotes an integrated, team-based model of care coordination; • Develops, maintains, and updates comprehensive, integrated plans of care; • Integrates care with other providers and ensures that information is shared effectively with families and among and between providers; and • Performs care tracking, including sending of proactive reminders. Each CSHCN Program client must have a medical home. We anticipate no less than 250 distinct medical homes.
4.1.1.23 - Software must enable the State to make changes without additional programming. (For example: creating new forms or assessments, creating new entities, creating new demographics and creating ad-hoc reports). • Can you provide a current technology that demonstrates this functionality?	• Social Solutions' ETO software
4.1.5.2.3 - Advance User Training Webinar that includes step-by- step instructions for system development. Webinar will become the property of OMCFH upon delivery and will be hosted on OMCFH's website. • Can you clarify what the specific system development is (coding, modularity, report development, etc.) that require instructions?	The system should include a user interface that allows the system administrator to add and/or change system components (forms, surveys, demographic information that does not alter the functionality of the system, etc.). This training would provide support for how to utilize this user interface. The user interface should utilize point and click menus, coding should not be required for this requirement.
3.1 it states that: Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications: 3.1. Vendor must provide documentation of an executed contract as proof of experience in the delivering and supporting of a performance and case management system currently in operation for at least one (1) State, specific to care coordination for children with specialized health care needs. This documentation should be submitted with bid but must be provided prior to award. Please clarify if it is expected for the Vendor to have experience with systems for "care coordination for children with specialized health care needs" or if it is sufficient to have experience and	Experience with care coordination systems for children with specialized health care needs is required.

Questions	Answers
performance with case management systems, in general.	
Has the Office of Maternal, Child and Family Health seen any demonstrations of a system or systems that may fulfill their requirements? If yes, can a list be provided?	o Social Solutions' ETO software o Collective Impact's Venue software
In addition to the pricing page, is there a template that is to be used when responding to the bid?	No, there is no template
Is the main goal (or focus) of the RFQ to facilitate the coordination of a medical network; or providing case management services?	The CSHCN Program seeks to provide optimal coordination and integration of services needed by CSHCN and their families. The goal is to provide a system that will allow for case management among all members of the client's medical home, as facilitated by the OMCFH's care coordination teams.
Is the vendor expected to respond specifically to the Business Requirements document, or is this document provided for project background and workflow understanding, and Specifications document is the main document for Specifications/Requirements-specific responses?	The Business Requirements document is for project background and workflow understanding. The Specifications/Requirements document is the main document.
3.1 Vendor must provide documentation of an executed contract as proof of experience in the delivering and supporting of a performance and case management system currently in operation for at least one (1) State, specific to care coordination for children with specialized health care needs. This documentation should be submitted with bid but must be provided prior to award. Question: What specific information is needed as "documentation of an executed contract"?	-"Documentation of an executed contract" requires the vendor to produce a complete and formally signed a document outlining the expectations of two or more parties, e.g. a purchase order, grant or memorandum of understanding.
4.1.5.2.3 Advance User Training Webinar that includes step-by-step instructions for system development. Webinar will become the property of OMCFH upon delivery and will be hosted on OMCFH's website. Question: What is meant by "Instructions for system development"?	"Instructions for system development" means the necessary instructions for the OMCFH system administrator to add and/or change.
4.1.7.2 Vendor will provide maintenance and will include all upgrades of the web-based data system (specific to the license	Yes

Questions	Answers
purchased) to CYSHCN. Upgrades will be based only upon the data referenced in Section 4.1.1 and/or Attachment_2 "Business Requirements Document" of this RFQ. Question: Will the state consider a COTS/MOTS solution with additional customizations for CYSHCN? Upgrades for COTS/MOTS software will include other enhancements.	
4.1.8.3 Vendor will provide access for all registered users to web based software trainings offered no less than weekly for the duration of the contract. Question: Is the vendor required to provide weekly trainings on demand or in a standing webinar format? Will a pre-recorded video of the training suffice?	A standing webinar format meets the "weekly trainings" requirement. A "pre-recorded video of the training" will not suffice.
Assumptions: 1. The system will be accessible via the internet for the clients, client family, primary care physicians, medical home teams, care coordinators, CSHCN Administration, Eligibility Unit, and System Administrator. Question: Describe the type of access desired for the clients and their families? Would it be read-only or should they be allowed to edit data? What about their viewing capability? Should they view the full record, or just a subset of the fields? 2. The system will interact with Application Extender for document storage. Question: Please describe the interaction requirement. Is it an interface to send/receive data?	1. Clients and their families will have limited access (read-only access to a portion of their record and limited write access to add case comments/contacts and fill certain forms/surveys). 2. The system must be able to link to the client's records stored in Application Extender. There would be no requirement to directly send or receive data other than that required to match/link the records.
Requirements Matrix: The system must be able to interface with Application Extender. Question: Please describe the interface requirements.	The system must be able to link to the client's records stored in Application Extender. There would be no requirement to directly send or receive data other than that required to match/link the records.
The system must record communication among integrated medical homes. Question: What is the nature of this communication; where is it captured? At the patient level or service level?	This would be in the form of case comments/contacts recorded by all members of the medical home with access to the system (client/family, care coordination team members, the primary care physician).
The system must record data on emergency room and urgent care	This information would be received from West Virginia Medicaid's Management Information System, but the ability to be entered by a

Questions	Answers
utilization. Question: Will this information be entered by a system user or is receipt of Admission, Discharge, and Transfer (ADT) messages expected?	system user would also be required. This information will be entered by a system user. ADT messaging is not required.
The system must record data from physician and family surveys. Question: What is the nature of these surveys? Is it an online survey that the taker fills online and their answers are stored and linked to their record; or is it that the results of a survey are attached to the patient record or service record? Are the surveys satisfaction surveys, or assessments?	Surveys can be online satisfaction surveys or assessments. Survey data will need to be stored and linked to the user's record. Both
The system must allow for differential levels of access for different users, including CYSHCN and family. Question: Please describe the nature of access desired for CYSHCN and family.	Clients and their families will have limited access (read-only access to a portion of their record and limited write access to add case comments/contacts and fill certain forms/surveys).
The system must enable Title V Agency to create ad-hoc reports and must include licensing for ad-hoc report creation and publishing Question: Please describe the licensing needed.	System must include licensing for a built-in report generation tool as well as the ability to export data into a format compatible with data manipulation in Microsoft Excel, Microsoft Access, SPSS, SAS, and STATA.
The system must enable data sharing amongst providers governed by rules established within the system. Question: Can you describe the nature of (or provide examples of) the data that providers would share and the rules that would govern this sharing? Would providers share an entire case, or only parts of a case such as specific forms or specific data fields?	• The client's care plan (or certain other forms) should be shared between all users. The rules established within the system would dictate which forms can be accessed by the user's level of access within the system. ○ Providers would share specific forms or data fields in the case (i.e. the client's care plan).
The system must provide reminders for well child visits due based on calculation of age and previous appointment dates. Question: Are the reminders expected to be inbound (within the solution software), or outbound (such as to user calendars, email, or phone)?	Inbound within the system; the system interface should include a dashboard where each user can see (and mark as complete) all reminders and messages from other users.
Record in the system can be marked as inactive and their information would not be included in reports. Question: Will inactive records be viewable in the application web interface? Can the user search for inactive records?	○ Yes, the system must retain inactive records but should have the ability to exclude these from reports (if desired) and from view of the end user based on their level of access within the system. The user's level of access within the system will determine if they can search for inactive records; but yes, some user levels will require the ability to search inactive records. ○ Yes

Questions | Answers

Questions	Answers
Exhibit A – Pricing Page: 1. It is stated in the RFQ that the desired system will be hosted by the vendor, however, the Pricing Page does not include hosting cost. Where does the vendor provide the hosting fees? 2. Where do we mention the hosting fees for year two, three and four?	This is included in Year 1.
We understand that you have been using ETO (Social Solutions) as your current software provider since 2013 and that you need a new software in order to expand your data integration capacity and improve data collection to support better reporting. Are there any other reasons you are looking for a new system?	The CSHCN Program has never used ETO or any other software provider. The CSHCN Program desires to procure a web-based performance and case management system to support the coordination and integration of information and services for children and youth with special health care needs.
Since improvements are needed with the new software does your agency plan to invest more capital than the $149,000 that was agreed upon in the 2013 agreement? If so, how much is the agency planning to invest in 2016 and how many end users would there be?	N/A This question does not pertain to the CSHCN Program. See response to the previous question.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MCH1600000003

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)

[X] Addendum No. 1		[ ] Addendum No. 6
[X] Addendum No. 2		[ ] Addendum No. 7
[X] Addendum No. 3		[ ] Addendum No. 8
[ ] Addendum No. 4		[ ] Addendum No. 9
[ ] Addendum No. 5		[ ] 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.

Local Data Solutions
Company

Sig Bth
Authorized Signature

8/10/2016
Date

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

SOLICITATION NUMBER: CRFQ 0506 MCH1600000003
Addendum Number: 3

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:

1. Change bid opening date from July 28, 2016 to August 11, 2016

No other changes made.

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.

ATTACHMENT A

No Attachment for this
Addendum_3

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MCH1600000003

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)

[X] Addendum No. 1   [ ] Addendum No. 6

[X] Addendum No. 2   [ ] Addendum No. 7

[X] Addendum No. 3   [ ] Addendum No. 8

[ ] Addendum No. 4   [ ] Addendum No. 9

[ ] Addendum No. 5   [ ] 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.

Local Data Solutions
Company

(signature)
Authorized Signature

_8/10/2016_
Date

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

GENERAL TERMS AND CONDITIONS:

1. CONTRACTUAL AGREEMENT: Issuance of a Award Document signed by the Purchasing Division Director, or his designee, and approved as to form by the Attorney General's office constitutes acceptance of this Contract made by and between the State of West Virginia and the Vendor. Vendor's signature on its bid signifies Vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

2. DEFINITIONS: As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this Solicitation/Contract.

2.1. "Agency" or **"Agencies"** means the agency, board, commission, or other entity of the State of West Virginia that is identified on the first page of the Solicitation or any other public entity seeking to procure goods or services under this Contract.

2.2. "Bid" or **"Proposal"** means the vendors submitted response to this solicitation.

2.3. "Contract" means the binding agreement that is entered into between the State and the Vendor to provide the goods or services requested in the Solicitation.

2.4. "Director" means the Director of the West Virginia Department of Administration, Purchasing Division.

2.5. "Purchasing Division" means the West Virginia Department of Administration, Purchasing Division.

2.6. "Award Document" means the document signed by the Agency and the Purchasing Division, and approved as to form by the Attorney General, that identifies the Vendor as the contract holder.

2.7. "Solicitation" means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

2.8. "State" means the State of West Virginia and/or any of its agencies, commissions, boards, etc. as context requires.

2.9. "Vendor" or **"Vendors"** means any entity submitting a bid in response to the Solicitation, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

3. CONTRACT TERM; RENEWAL; EXTENSION: The term of this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below:

☐ **Term Contract**

Initial Contract Term: This Contract becomes effective on _____ and extends for a period of _____ year(s).

Renewal Term: This Contract may be renewed upon the mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any request for renewal should be submitted to the Purchasing Division thirty (30) days prior to the expiration date of the initial contract term or appropriate renewal term. A Contract renewal shall be in accordance with the terms and conditions of the original contract. Renewal of this Contract is limited to _____ successive one (1) year periods or multiple renewal periods of less than one year, provided that the multiple renewal periods do not exceed _____ months in total. Automatic renewal of this Contract is prohibited. Notwithstanding the foregoing, Purchasing Division approval is not required on agency delegated or exempt purchases. Attorney General approval may be required for vendor terms and conditions.

Delivery Order Limitations: In the event that this contract permits delivery orders, a delivery order may only be issued during the time this Contract is in effect. Any delivery order issued within one year of the expiration of this Contract shall be effective for one year from the date the delivery order is issued. No delivery order may be extended beyond one year after this Contract has expired.

☐ **Fixed Period Contract:** This Contract becomes effective upon Vendor's receipt of the notice to proceed and must be completed within _____ days.

☑ **Fixed Period Contract with Renewals:** This Contract becomes effective upon Vendor's receipt of the notice to proceed and part of the Contract more fully described in the attached specifications must be completed within two hundred seventy-four (274) days.

Upon completion, the vendor agrees that maintenance, monitoring, or warranty services will be provided for one year thereafter with an additional three (3) successive one year renewal periods or multiple renewal periods of less than one year provided that the multiple renewal periods do not exceed thirty-six (36) months in total. Automatic renewal of this Contract is prohibited.

☐ **One Time Purchase:** The term of this Contract shall run from the issuance of the Award Document until all of the goods contracted for have been delivered, but in no event will this Contract extend for more than one fiscal year.

☐ **Other:** See attached.

4. NOTICE TO PROCEED: Vendor shall begin performance of this Contract immediately upon receiving notice to proceed unless otherwise instructed by the Agency. Unless otherwise specified, the fully executed Award Document will be considered notice to proceed.

5. QUANTITIES: The quantities required under this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below.

☐ **Open End Contract:** Quantities listed in this Solicitation are approximations only, based on estimates supplied by the Agency. It is understood and agreed that the Contract shall cover the quantities actually ordered for delivery during the term of the Contract, whether more or less than the quantities shown.

☐ **Service:** The scope of the service to be provided will be more clearly defined in the specifications included herewith.

☑ **Combined Service and Goods:** The scope of the service and deliverable goods to be provided will be more clearly defined in the specifications included herewith.

☐ **One Time Purchase:** This Contract is for the purchase of a set quantity of goods that are identified in the specifications included herewith. Once those items have been delivered, no additional goods may be procured under this Contract without an appropriate change order approved by the Vendor, Agency, Purchasing Division, and Attorney General's office.

6. EMERGENCY PURCHASES: The Purchasing Division Director may authorize the Agency to purchase goods or services in the open market that Vendor would otherwise provide under this Contract if those goods or services are for immediate or expedited delivery in an emergency. Emergencies shall include, but are not limited to, delays in transportation or an unanticipated increase in the volume of work. An emergency purchase in the open market, approved by the Purchasing Division Director, shall not constitute of breach of this Contract and shall not entitle the Vendor to any form of compensation or damages. This provision does not excuse the State from fulfilling its obligations under a One Time Purchase contract.

7. REQUIRED DOCUMENTS: All of the items checked below must be provided to the Purchasing Division by the Vendor as specified below.

☐ **BID BOND (Construction Only):** Pursuant to the requirements contained in W. Va. Code § 5-22-1(c), All Vendors submitting a bid on a construction project shall furnish a valid bid bond in the amount of five percent (5%) of the total amount of the bid protecting the State of West Virginia. The bid bond must be submitted with the bid.

☐ **PERFORMANCE BOND:** The apparent successful Vendor shall provide a performance bond in the amount of _____. The performance bond must be received by the Purchasing Division prior to Contract award. On construction contracts, the performance bond must be 100% of the Contract value.

☐ **LABOR/MATERIAL PAYMENT BOND:** The apparent successful Vendor shall provide a labor/material payment bond in the amount of 100% of the Contract value. The labor/material payment bond must be delivered to the Purchasing Division prior to Contract award.
In lieu of the Bid Bond, Performance Bond, and Labor/Material Payment Bond, the Vendor may provide certified checks, cashier's checks, or irrevocable letters of credit. Any certified check, cashier's check, or irrevocable letter of credit provided in lieu of a bond must be of the same amount and delivered on the same schedule as the bond it replaces. A letter of credit submitted in lieu of a performance and labor/material payment bond will only be allowed for projects under $100,000. Personal or business checks are not acceptable.

☐ **MAINTENANCE BOND:** The apparent successful Vendor shall provide a two (2) year maintenance bond covering the roofing system. The maintenance bond must be issued and delivered to the Purchasing Division prior to Contract award.

☐ **INSURANCE:** The apparent successful Vendor shall furnish proof of the following insurance prior to Contract award and shall list the state as a certificate holder:

☐ **Commercial General Liability Insurance:** In the amount of _____
_____ or more.

☐ **Builders Risk Insurance:** In an amount equal to 100% of the amount of the Contract.

☐

☐

☐

☐

☐

The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether or not that insurance requirement is listed above.

☑ **LICENSE(S) / CERTIFICATIONS / PERMITS:** In addition to anything required under the Section entitled Licensing, of the General Terms and Conditions, the apparent successful Vendor shall furnish proof of the following licenses, certifications, and/or permits prior to Contract award, in a form acceptable to the Purchasing Division.

☑ 3.1 Proof of experience in delivering and supporting a performance and case management system, currently in operation, for at least one (1) State.

☐

☐

☐

The apparent successful Vendor shall also furnish proof of any additional licenses or certifications contained in the specifications prior to Contract award regardless of whether or not that requirement is listed above.

8. WORKERS' COMPENSATION INSURANCE: The apparent successful Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

9. LITIGATION BOND: The Director reserves the right to require any Vendor that files a protest of an award to submit a litigation bond in the amount equal to one percent of the lowest bid submitted or $5,000, whichever is greater. The entire amount of the bond shall be forfeited if the hearing officer determines that the protest was filed for frivolous or improper purpose, including but not limited to, the purpose of harassing, causing unnecessary delay, or needless expense for the Agency. All litigation bonds shall be made payable to the Purchasing Division. In lieu of a bond, the protester may submit a cashier's check or certified check payable to the Purchasing Division. Cashier's or certified checks will be deposited with and held by the State Treasurer's office. If it is determined that the protest has not been filed for frivolous or improper purpose, the bond or deposit shall be returned in its entirety.

10. LIQUIDATED DAMAGES: Vendor shall pay liquidated damages in the amount of
N/A
_____
for N/A _____.
This clause shall in no way be considered exclusive and shall not limit the State or Agency's right to pursue any other available remedy.

11. ACCEPTANCE: Vendor's signature on its bid, or on the certification and signature page, constitutes an offer to the State that cannot be unilaterally withdrawn, signifies that the product or service proposed by vendor meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the Solicitation unless otherwise indicated.

12. PRICING: The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this Solicitation/Contract by the State. A Vendor's inclusion of price adjustment provisions in its bid, without an express authorization from the State in the Solicitation to do so, may result in bid disqualification.

13. PAYMENT: Payment in advance is prohibited under this Contract. Payment may only be made after the delivery and acceptance of goods or services. The Vendor shall submit invoices, in arrears.

14. PURCHASING CARD ACCEPTANCE: The State of West Virginia currently utilizes a Purchasing Card program, administered under contract by a banking institution, to process payment for goods and services. The Vendor must accept the State of West Virginia's Purchasing Card for payment of all orders under this Contract unless the box below is checked.

☐ Vendor is not required to accept the State of West Virginia's Purchasing Card as payment for all goods and services.

15. TAXES: The Vendor shall pay any applicable sales, use, personal property or any other taxes arising out of this Contract and the transactions contemplated thereby. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

16. ADDITIONAL FEES: Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly provided for in the solicitation published by the State of West Virginia or included in the unit price or lump sum bid amount that Vendor is required by the solicitation to provide. Including such fees or charges as notes to the solicitation may result in rejection of vendor's bid. Requesting such fees or charges be paid after the contract has been awarded may result in cancellation of the contract.

17. FUNDING: This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available.

18. CANCELLATION: The Purchasing Division Director reserves the right to cancel this Contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The Purchasing Division Director may also cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-6.1.e.

19. TIME: Time is of the essence with regard to all matters of time and performance in this Contract.

20. APPLICABLE LAW: This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, West Virginia Code or West Virginia Code of State Rules is void and of no effect.

21. COMPLIANCE: Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

22. ARBITRATION: Any references made to arbitration contained in this Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby deleted, void, and of no effect.

23. MODIFICATIONS: This writing is the parties' final expression of intent. Notwithstanding anything contained in this Contract to the contrary no modification of this Contract shall be binding without mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Purchasing Division and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.

24. WAIVER: The failure of either party to insist upon a strict performance of any of the terms or provision of this Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

25. SUBSEQUENT FORMS: The terms and conditions contained in this Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by Vendor to the Agency or Purchasing Division such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of Vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

26. ASSIGNMENT: Neither this Contract nor any monies due, or to become due hereunder, may be assigned by the Vendor without the express written consent of the Agency, the Purchasing Division, the Attorney General's office (as to form only), and any other government agency or office that may be required to approve such assignments. Notwithstanding the foregoing, Purchasing Division approval may or may not be required on certain agency delegated or exempt purchases.

27. WARRANTY: The Vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the Agency; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

28. STATE EMPLOYEES: State employees are not permitted to utilize this Contract for personal use and the Vendor is prohibited from permitting or facilitating the same.

29. BANKRUPTCY: In the event the Vendor files for bankruptcy protection, the State of West Virginia may deem this Contract null and void, and terminate this Contract without notice.

30. PRIVACY, SECURITY, AND CONFIDENTIALITY: The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the Agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the Agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in http://www.state.wv.us/admin/purchase/privacy/default.html.

31. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

32. LICENSING: In accordance with West Virginia Code of State Rules § 148-1-6.1.e, Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Upon request, the Vendor must provide all necessary releases to obtain information to enable the Purchasing Division Director or the Agency to verify that the Vendor is licensed and in good standing with the above entities.

33. ANTITRUST: In submitting a bid to, signing a contract with, or accepting a Award Document from any agency of the State of West Virginia, the Vendor agrees to convey, sell, assign, or transfer to the State of West Virginia all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to Vendor.

34. VENDOR CERTIFICATIONS: By signing its bid or entering into this Contract, Vendor certifies (1) that its bid or offer was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid or offer is in all respects fair and without collusion or fraud; (3) that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; and (4) that it has reviewed this Solicitation in its entirety; understands the requirements, terms and conditions, and other information contained herein.

Vendor's signature on its bid or offer also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Agency. The individual signing this bid or offer on behalf of Vendor certifies that he or she is authorized by the Vendor to execute this bid or offer or any documents related thereto on Vendor's behalf; that he or she is authorized to bind the Vendor in a contractual relationship; and that, to the best of his or her knowledge, the Vendor has properly registered with any State agency that may require registration.

35. VENDOR RELATIONSHIP: The relationship of the Vendor to the State shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by this Contract. The Vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this Solicitation and resulting contract. Neither the Vendor, nor any employees or subcontractors of the Vendor, shall be deemed to be employees of the State for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing.

Vendor shall hold harmless the State, and shall provide the State and Agency with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

37. PURCHASING AFFIDAVIT: In accordance with West Virginia Code § 5A-3-10a, all Vendors are required to sign, notarize, and submit the Purchasing Affidavit stating that neither the Vendor nor a related party owe a debt to the State in excess of $1,000. The affidavit must be submitted prior to award, but should be submitted with the Vendor's bid. A copy of the Purchasing Affidavit is included herewith.

38. ADDITIONAL AGENCY AND LOCAL GOVERNMENT USE: This Contract may be utilized by other agencies, spending units, and political subdivisions of the State of West Virginia; county, municipal, and other local government bodies; and school districts ("Other Government Entities"). Any extension of this Contract to the aforementioned Other Government Entities must be on the same prices, terms, and conditions as those offered and agreed to in this Contract, provided that such extension is in compliance with the applicable laws, rules, and ordinances of the Other Government Entity. If the Vendor does not wish to extend the prices, terms, and conditions of its bid and subsequent contract to the Other Government Entities, the Vendor must clearly indicate such refusal in its bid. A refusal to extend this Contract to the Other Government Entities shall not impact or influence the award of this Contract in any manner.

39. CONFLICT OF INTEREST: Vendor, its officers or members or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the Agency.

40. REPORTS: Vendor shall provide the Agency and/or the Purchasing Division with the following reports identified by a checked box below:

☑ Such reports as the Agency and/or the Purchasing Division may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by agency, etc.

☐ Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by agency. Quarterly reports should be delivered to the Purchasing Division via email at purchasing.requisitions@wv.gov.

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

After the contract for such services has been approved, but before any such employees are permitted to be on the grounds or in the buildings of the Capitol complex or have access to sensitive or critical information, the service provider shall submit a list of all persons who will be physically present and working at the Capitol complex to the Director of the Division of Protective Services for purposes of verifying compliance with this provision. The State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check.

Service providers should contact the West Virginia Division of Protective Services by phone at (304) 558-9911 for more information.

42. PREFERENCE FOR USE OF DOMESTIC STEEL PRODUCTS: Except when authorized by the Director of the Purchasing Division pursuant to W. Va. Code § 5A-3-56, no contractor may use or supply steel products for a State Contract Project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W. Va. Code § 5A-3-56. As used in this section:

a. "State Contract Project" means any erection or construction of, or any addition to, alteration of or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of and materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after June 6, 2001.
b. "Steel Products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated or otherwise similarly processed, or processed by a combination of two or more or such operations, from steel made by the open heath, basic oxygen, electric furnace, Bessemer or other steel making process. The Purchasing Division Director may, in writing, authorize the use of foreign steel products if:
c. The cost for each contract item used does not exceed one tenth of one percent (.1%) of the total contract cost or two thousand five hundred dollars ($2,500.00), whichever is greater. For the purposes of this section, the cost is the value of the steel product as delivered to the project; or
d. The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

43. PREFERENCE FOR USE OF DOMESTIC ALUMINUM, GLASS, AND STEEL: In Accordance with W. Va. Code § 5-19-1 et seq., and W. Va. CSR § 148-10-1 et seq., for every contract or subcontract, subject to the limitations contained herein, for the construction, reconstruction, alteration, repair, improvement or maintenance of public works or for the purchase of any item of machinery or equipment to be used at sites of public works, only domestic aluminum, glass or steel products shall be supplied unless the spending officer determines, in writing, after the receipt of offers or bids, (1) that the cost of domestic aluminum, glass or steel products is unreasonable or inconsistent with the public interest of the State of West Virginia, (2) that domestic aluminum, glass or steel products are not produced in sufficient quantities to meet the contract requirements, or (3) the available domestic aluminum, glass, or steel do not meet the contract specifications. This provision only applies to public works contracts awarded in an amount more than fifty thousand dollars ($50,000) or public works contracts that require more than ten thousand pounds of steel products.

The cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than twenty percent (20%) of the bid or offered price for foreign made aluminum, glass, or steel products. If the domestic aluminum, glass or steel products to be supplied or produced in a "substantial labor surplus area", as defined by the United States Department of Labor, the cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than thirty percent (30%) of the bid or offered price for foreign made aluminum, glass, or steel products. This preference shall be applied to an item of machinery or equipment, as indicated above, when the item is a single unit of equipment or machinery manufactured primarily of aluminum, glass or steel, is part of a public works contract and has the sole purpose or of being a permanent part of a single public works project. This provision does not apply to equipment or machinery purchased by a spending unit for use by that spending unit and not as part of a single public works project.

All bids and offers including domestic aluminum, glass or steel products that exceed bid or offer prices including foreign aluminum, glass or steel products after application of the preferences provided in this provision may be reduced to a price equal to or lower than the lowest bid or offer price for foreign aluminum, glass or steel products plus the applicable preference. If the reduced bid or offer prices are made in writing and supersede the prior bid or offer prices, all bids or offers, including the reduced bid or offer prices, will be reevaluated in accordance with this rule.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Ty Petrice, Software Team Lead
(Name, Title)
Ty Petrice, Software Team Lead
(Printed Name and Title)
144 Scenery Dr Morgantown, WV 26505
(Address)
_(304) 641-1767_
(Phone Number) / (Fax Number)
ty@localdatasolutions.com
(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Local Data Solutions
(Company)
Ty Petrice Software Team Lead
(Authorized Signature) (Representative Name, Title)
Ty Petrice Software Team Lead
(Printed Name and Title of Authorized Representative)
_8/10/2016_
(Date)
_(304) 641-1767_
(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ 0506 MCH1600000003

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)

☑ Addendum No. 1   ☐ Addendum No. 6
☑ Addendum No. 2   ☐ Addendum No. 7
☑ Addendum No. 3   ☐ Addendum No. 8
☐ Addendum No. 4   ☐ Addendum No. 9
☐ Addendum No. 5   ☐ 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.

Local Data Solutions
Company

[signature]
Authorized Signature

8/10/2016
Date

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