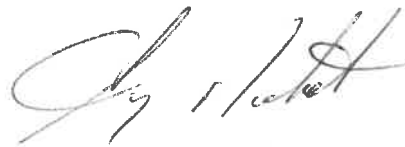


# NOTICE

Please note this bid from AUTOMATED HEALTH SYSTEMS for the solicitation BMS2100000001 was received at the Purchasing Division office prior to the established bid-opening date and time on November 10, 2020, but was not publicized due to technical errors at the bid opening. This response has since been loaded and is now posted.

A handwritten signature in black ink, appearing to read 'Guy Nisbet', is positioned above the printed name.

Guy Nisbet

Assistant Purchasing Director





The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at ***wvOASIS.gov***. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at ***WVPurchasing.gov*** with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.



## Header 5

[List View](#)

## General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 761466

Procurement Type: Central Master Agreement

Vendor ID: 000000161628

Legal Name: AUTOMATED HEALTH SYSTEMS INC

Alias/DBA:

Total Bid: \$28,403,130.00

Response Date: 11/09/2020

Response Time: 15:01

Responded By User ID: Automated

First Name: Gail

Last Name: Trautmann

Email: gtrautmann@automated-

SO Doc Code: CRFQ

SO Dept: 0511

SO Doc ID: BMS2100000001

Published Date: 10/29/20

Close Date: 11/10/20

Close Time: 13:30

Status: Closed

Solicitation Description: MANAGED CARE ENROLLMENT  
BROKERAGE SERVICES

Total of Header Attachments: 5

Total of All Attachments: 5





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

State of West Virginia  
Solicitation Response

**Proc Folder:** 761466  
**Solicitation Description:** MANAGED CARE ENROLLMENT BROKERAGE SERVICES  
**Proc Type:** Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2020-11-10 13:30	SR 0511 ESR11072000000003447	1

**VENDOR**  
000000161628  
AUTOMATED HEALTH SYSTEMS INC

**Solicitation Number:** CRFQ 0511 BMS2100000001  
**Total Bid:** 28403130  
**Response Date:** 2020-11-09  
**Response Time:** 15:01:22  
**Comments:**

**FOR INFORMATION CONTACT THE BUYER**  
Crystal G Hustead  
(304) 558-2402  
crystal.g.hustead@wv.gov

**Vendor**  
**Signature X** **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	Implementation-BMS				279000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:**

**Extended Description:**

Implementation Costs-BMS: Staffing, Computer (including software), Facilities, Consulting Services, and Other Costs

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Base Year One-200,000-300,000 members				864000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** Per Member Per Month \$0.32

**Extended Description:**

Base Year One-PMPM rate X 300,000 members X 9 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Base Year One-300,000-400,000 members				1188000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** Per Member Per Month \$0.33

**Extended Description:**

Base Year One-PMPM rate X 400,000 members X 9 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Base Year One-400,001-500,000 members				1530000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** Per Member Per Month \$0.34

**Extended Description:**

Base Year One-PMPM rate X 500,000 members X 9 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Base Year One->/=500,001 members				1485003.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.33 per member per month

**Extended Description:**

Base Year One-PMPM rate X 500,001 members X 9 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Optional Renewal Year One-200,000-300,000 members				1188000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.33 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 300,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
7	Optional Renewal Year One-300,000-400,000 members				1632000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 400,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
8	Optional Renewal Year One-400,001-500,000 members				2100000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 500,000 members X 12 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
9	Optional Renewal Year One->/=500,001 members				2040004.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 500,001 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
10	Optional Renewal Year Two-200,000-300,000 members				1224000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 300,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
11	Optional Renewal Year Two-300,000-400,000 members				1680000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 400,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
12	Optional Renewal Year Two-400,001-500,000 members				2160000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.36 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 500,000 members X 12 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
13	Optional Renewal Year Two->/=500,001 members				2100004.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 500,001 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
14	Optional Renewal Year Three-200,000-300,000 members				1260000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 300,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
15	Optional Renewal Year Three-300,000-400,000 members				1728000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.36 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 400,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
16	Optional Renewal Year Three-400,001-500,000 members				2220000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.37 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 500,000 members X 12 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
17	Optional Renewal Year Three->/=500,001 members				2160004.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.36 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 500,001 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
18	Base Year One-Ad Hoc Hourly Rate Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Base Year One Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
19	Opt. Renewal Yr 1-Ad Hoc Hourly Rate Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year One Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
20	Opt. Renewal Yr 2-Ad Hoc Hourly Rate Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Two Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
21	Opt. Renewal Yr 3-Ad Hoc Hourly Rate Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Three Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
22	Base Year One-Ad Hoc Hourly Rate Non- Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Base Year One Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
23	Opt.Renew.Yr1 -Ad Hoc Hrly Rate Non- Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year One Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
24	Opt.Renew.Yr2 -Ad Hoc Hrly Rate Non-Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Two Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
25	Opt.Renew.Yr3 -Ad Hoc Hrly Rate Non-Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Three Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
26	Implementation-WVCHIP				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Implementation Costs-WVCHIP: Staffing, Computer (including software), Facilities, Consulting Services, and Other Costs

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
27	WVCHIP: Base Year One-≤15,000 members				43200.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.32 per member per month

**Extended Description:**

Base Year One-PMPM rate X 15,000 members X 9 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
28	WVCHIP: Base Year One-15,001-20,000 members				59400.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.33 per member per month

**Extended Description:**

Base Year One-PMPM rate X 20,000 members X 9 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
29	WVCHIP: Base Year One-20,001-25,000 members				76500.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Base Year One-PMPM rate X 25,000 members X 9 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
30	WVCHIP: Base Year One->/=25,001 members				74253.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.33 per member per month

**Extended Description:**

Base Year One-PMPM rate X 25,001 members X 9 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
31	WVCHIP: Optional Renewal Year One-</=15,000 members				59400.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.33 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 15,000 members X 12 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
32	WVCHIP: Optional Renewal Year One-15,001-20,00 members				81600.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 20,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
33	WVCHIP: Optional Renewal Year One-20,001-25,000 members				105000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 25,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
34	WVCHIP: Optional Renewal Year One->/ =25,001 members				102004.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Optional Renewal Year One-PMPM rate X 25,001 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
35	WVCHIP: Optional Renewal Year Two-</ =15,000 members				61200.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.34 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 15,000 members X 12 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
36	WVCHIP: Optional Renewal Year Two-15,001-20,000 members				84000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 20,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
37	WVCHIP: Optional Renewal Year Two-20,001-25,000 members				108000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.36 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 25,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
38	WVCHIP: Optional Renewal Year Two->/ =25,001 members				105004.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year Two-PMPM rate X 25,001 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
39	WVCHIP: Optional Renewal Year Three-</ =15,000 members				63000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.35 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 15,000 members X 12 Months



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
40	WVCHIP: Optional Renewal Year Three-15,001-20,000 members				86400.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.36 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 20,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
41	WVCHIP: Optional Renewal Year Three-20,001-25,000 members				111000.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.37 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 25,000 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
42	WVCHIP: Optional Renewal Year Three->/ =25,001 members				108004.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** \$0.36 per member per month

**Extended Description:**

Optional Renewal Year Three-PMPM rate X 25,001 members X 12 Months

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
43	WVCHIP: Base YR 1-Ad Hoc Hourly Rate Information Technology				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Base Year One Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
44	WVCHIP: Opt. Renew. Yr 1-Ad Hoc Hourly Rate Information Tech				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year One Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
45	WVCHIP: Opt. Renew. Yr 2-Ad Hoc Hourly Rate Information Tech				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Two Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
46	WVCHIP: Opt. Renew. Yr 3-Ad Hoc Hourly Rate Information Tech				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Three Ad Hoc Hourly Rate Information Technology  
Estimated 5000 hours X hourly rate



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
47	WVCHIP: Base Yr 1-Ad Hoc Hourly Rate Non- Information Tech.				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Base Year One Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
48	WVCHIP:Opt.Renew.Yr1 -Ad Hoc Hrly Rate Non- Information Tech				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year One Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
49	WVCHIP:Opt.Renew.Yr2 -Ad Hoc Hrly Rate Non- Information Tech				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Two Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
50	WVCHIP:Opt.Renew.Yr3 -Ad Hoc Hrly Rate Non- Information Tech				13950.00

Comm Code	Manufacturer	Specification	Model #
85121700			

**Commodity Line Comments:** hourly rate \$2.79

**Extended Description:**

Optional Renewal Year Three Ad Hoc Hourly Rate Non- Information Technology  
Estimated 5000 hours X hourly rate



**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFQ BMS2100000001**

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

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

**Addendum Numbers Received:**

(Check the box next to each addendum received)

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

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

Automated Health Systems, Inc.

Company



Authorized Signature

11/6/20

Date

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



# West Virginia Ethics Commission



## Disclosure of Interested Parties to Contracts

Pursuant to W. Va. Code § 6D-1-2, a state agency may not enter into a contract, or a series of related contracts, that has/have an actual or estimated value of \$1 million or more until the business entity submits to the contracting state agency a Disclosure of Interested Parties to the applicable contract. In addition, the business entity awarded a contract is obligated to submit a supplemental Disclosure of Interested Parties reflecting any new or differing interested parties to the contract within 30 days following the completion or termination of the applicable contract.

For purposes of complying with these requirements, the following definitions apply:

*"Business entity"* means any entity recognized by law through which business is conducted, including a sole proprietorship, partnership or corporation, but does not include publicly traded companies listed on a national or international stock exchange.

*"Interested party"* or *"Interested parties"* means:

- (1) A business entity performing work or service pursuant to, or in furtherance of, the applicable contract, including specifically sub-contractors;
- (2) the person(s) who have an ownership interest equal to or greater than 25% in the business entity performing work or service pursuant to, or in furtherance of, the applicable contract. (This subdivision does not apply to a publicly traded company); and
- (3) the person or business entity, if any, that served as a compensated broker or intermediary to actively facilitate the applicable contract or negotiated the terms of the applicable contract with the state agency. (This subdivision does not apply to persons or business entities performing legal services related to the negotiation or drafting of the applicable contract.)

*"State agency"* means a board, commission, office, department or other agency in the executive, judicial or legislative branch of state government, including publicly funded institutions of higher education: Provided, that for purposes of W. Va. Code § 6D-1-2, the West Virginia Investment Management Board shall not be deemed a state agency nor subject to the requirements of that provision.

The contracting business entity must complete this form and submit it to the contracting state agency prior to contract award and to complete another form within 30 days of contract completion or termination.

*This form was created by the State of West Virginia Ethics Commission, 210 Brooks Street, Suite 300, Charleston, WV 25301-1804. Telephone: (304)558-0664; fax: (304)558-2169; e-mail: [ethics@wv.gov](mailto:ethics@wv.gov); website: [ethics.wv.gov](http://ethics.wv.gov).*



West Virginia Ethics Commission  
**Disclosure of Interested Parties to Contracts**

(Required by W. Va. Code § 6D-1-2)

**Name of Contracting Business Entity:** Automated Health Systems **Address:** 9370 McKnight Road, Suite 300  
Pittsburgh, PA 15237

**Name of Authorized Agent:** Joseph P. Cain III, CPA **Address:** Same as above.

**Contract Number:** BMS2100000001 **Contract Description:** Enrollment Brokerage Services

**Governmental agency awarding contract:** Department of Administration

☐ Check here if this is a Supplemental Disclosure

List the Names of Interested Parties to the contract which are known or reasonably anticipated by the contracting business entity for each category below (*attach additional pages if necessary*):

**1. Subcontractors or other entities performing work or service under the Contract**

☒ Check here if none, otherwise list entity/individual names below.

**2. Any person or entity who owns 25% or more of contracting entity (not applicable to publicly traded entities)**

☐ Check here if none, otherwise list entity/individual names below.

Dick Hart Dynasty Trust

**3. Any person or entity that facilitated, or negotiated the terms of, the applicable contract (excluding legal services related to the negotiation or drafting of the applicable contract)**

☒ Check here if none, otherwise list entity/individual names below.

Signature: 


Date Signed: 11/6/20

**Notary Verification**

State of Pennsylvania, County of Allegheny:

I, Joseph P. Cain III, CPA, the authorized agent of the contracting business entity listed above, being duly sworn, acknowledge that the Disclosure herein is being made under oath and under the penalty of perjury.

Taken, sworn to and subscribed before me this 6<sup>th</sup> day of November, 2020.

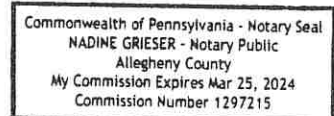
  
Notary Public's Signature

**To be completed by State Agency:**

Date Received by State Agency: \_\_\_\_\_

Date submitted to Ethics Commission: \_\_\_\_\_

Governmental agency submitting Disclosure: \_\_\_\_\_





STATE OF WEST VIRGINIA  
Purchasing Division

## PURCHASING AFFIDAVIT

**CONSTRUCTION CONTRACTS:** Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

**ALL CONTRACTS:** Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

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

**DEFINITIONS:**

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

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

**"Related party"** means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, 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: Automated Health Systems, Inc.

Authorized Signature: [Signature] Date: 11/4/20

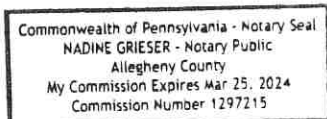
State of Pennsylvania

County of Allegheny, to-wit:

Taken, subscribed, and sworn to before me this 6<sup>th</sup> day of November, 2020.

My Commission expires March 25, 2020.

**AFFIX SEAL HERE**

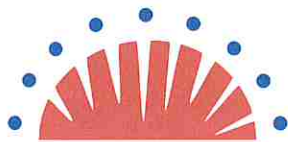


**NOTARY PUBLIC**

[Signature]

*Purchasing Affidavit (Revised 01/19/2018)*





## AUTOMATED HEALTH SYSTEMS

300 ARCADIA COURT, 9370 MCKNIGHT ROAD, PITTSBURGH, PA 15237 • (412) 367-3030 • (412) 367-6184 FAX

November 6, 2020

Crystal Hustead, CPPB  
Department of Administration, Purchasing Division  
2019 Washington Street East  
Charleston, WV 25305-0130

Dear Ms. Hustead,

Automated Health Systems (AHS) is pleased to submit our proposal in response to the West Virginia Department of Health and Human Resources CRFQ# BMS2100000001 for Managed Care Enrollment Brokerage Services. We are confident that we are presenting a budget that fully provides the resources necessary for the successful provision of services at a price that is mindful of constant budget constraints.

AHS shares the State's commitment to quality and through over 24 years of Enrollment Broker experience and 40 years of service to Medicaid populations across the county, we bring proven, tested solutions combined with innovative approaches to support the State in achieving its vision.

If you have any questions, please do not hesitate to contact me. I can be reached at the information below:

Joseph P. Cain III, CPA, Chief Financial Officer  
Address: 9370 McKnight Road, Suite 300  
Pittsburgh, PA 15237  
Phone: (412) 367-3030 ext. 2210  
Fax: (412) 367-1213  
Email: [ceo@automated-health.com](mailto:ceo@automated-health.com)

Thank you for the opportunity to submit a proposal in response to this CRFQ. We look forward to serving West Virginians once again.

Sincerely,

  
Joseph P. Cain III, CPA  
Chief Financial Officer





# West Virginia Managed Care Enrollment Brokerage Services Draft Implementation Plan\*

ID	Task Name	Start	Finish	Duration	Dec	Qtr 1, 2021 Jan	Feb	Mar	Qtr 2, 2021 Apr
0	<b>Project Plan</b>	<b>12/2/20</b>	<b>3/3/21</b>	<b>66 days</b>					
1	<b>1 Initiation Phase</b>	<b>12/2/20</b>	<b>3/3/21</b>	<b>66 days</b>					
2	1.1 Award contract	12/2/20	12/2/20	0 days					
3	1.2 Attend kick off meeting	12/3/20	12/3/20	1 day					
4	<b>1.3 Key Management Team</b>	<b>12/7/20</b>	<b>12/10/20</b>	<b>4 days</b>					
8	<b>1.4 Implementation Communication</b>	<b>12/7/20</b>	<b>12/7/20</b>	<b>1 day</b>					
11	1.5 Establish relationship with stakeholders (e.g., MCOs)	12/2/20	3/3/21	66 days					
12	<b>2 Planning Phase</b>	<b>12/7/20</b>	<b>2/9/21</b>	<b>47 days</b>					
13	<b>2.1 Implementation Plan</b>	<b>12/7/20</b>	<b>12/22/20</b>	<b>12 days</b>					
20	<b>2.2 Requirements Management Plan</b>	<b>12/7/20</b>	<b>12/28/20</b>	<b>16 days</b>					
29	<b>2.3 Mailing Enrollment Form/Materials Process</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
33	<b>2.4 Materials Development Plan</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
37	<b>2.5 Returned Mail Process</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
41	<b>2.6 Statewide Outreach and Education Strategy</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
45	<b>2.7 Quality Assurance Plan</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
49	<b>2.8 Systems Development Approach</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
53	<b>2.9 Organizational Chart</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
57	<b>2.10 Staffing Contingency Plan</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
61	<b>2.11 Business Continuity Plan</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
65	<b>2.12 MCO Contract Termination Plan</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
69	<b>2.13 Off-Site Work Plan</b>	<b>12/7/20</b>	<b>12/15/20</b>	<b>7 days</b>					
73	<b>2.14 Training Plan</b>	<b>12/28/20</b>	<b>1/12/21</b>	<b>12 days</b>					
80	<b>2.15 Standard Operating Procedures (SOPs)</b>	<b>1/4/21</b>	<b>1/19/21</b>	<b>12 days</b>					
87	<b>2.16 Document Processing Protocols</b>	<b>1/11/21</b>	<b>1/26/21</b>	<b>12 days</b>					
94	<b>2.17 Testing Plan</b>	<b>1/18/21</b>	<b>2/2/21</b>	<b>12 days</b>					
101	<b>2.18 Security &amp; BC/DR Plan</b>	<b>1/25/21</b>	<b>2/9/21</b>	<b>12 days</b>					
108	<b>3 Execution Phase</b>	<b>12/14/20</b>	<b>3/3/21</b>	<b>57 days</b>					





## West Virginia Managed Care Enrollment Brokerage Services Draft Implementation Plan\*

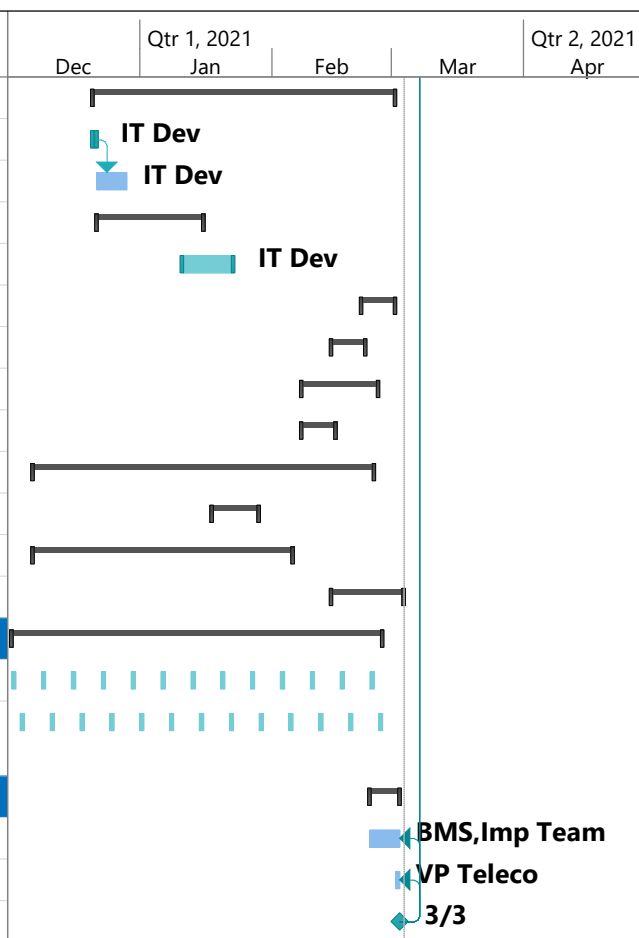
ID	Task Name	Start	Finish	Duration	Dec	Qtr 1, 2021 Jan	Feb	Mar	Qtr 2, 2021 Apr
109	<b>3.1 Facility</b>	<b>12/14/20</b>	<b>2/24/21</b>	<b>53 days</b>					
110	<b>3.1.1 Acquisition</b>	<b>12/14/20</b>	<b>12/28/20</b>	<b>11 days</b>					
117	<b>3.1.2 Build Out</b>	<b>12/29/20</b>	<b>2/15/21</b>	<b>35 days</b>					
125	<b>3.1.3 Equipment</b>	<b>1/4/21</b>	<b>2/17/21</b>	<b>33 days</b>					
130	<b>3.1.4 Mailroom Equipment</b>	<b>1/4/21</b>	<b>2/17/21</b>	<b>33 days</b>					
135	<b>3.1.5 Hardware/Software</b>	<b>1/11/21</b>	<b>2/24/21</b>	<b>33 days</b>					
140	<b>3.2 Staffing</b>	<b>1/4/21</b>	<b>2/15/21</b>	<b>31 days</b>					
144	<b>3.3 Training</b>	<b>1/18/21</b>	<b>3/3/21</b>	<b>32 days</b>					
145	<b>3.3.1 Training Modules</b>	<b>1/18/21</b>	<b>2/3/21</b>	<b>13 days</b>					
150	3.3.2 Train in-house interpretation unit	3/1/21	3/3/21	2 days					
151	3.3.3 Train supervisors	2/10/21	3/3/21	15 days					
152	3.3.4 Train staff	2/17/21	3/3/21	10 days					
153	<b>3.4 Scripts</b>	<b>1/11/21</b>	<b>2/15/21</b>	<b>26 days</b>					
165	<b>3.5 Policies and Procedures</b>	<b>1/25/21</b>	<b>2/22/21</b>	<b>21 days</b>					
172	<b>3.6 Customer Satisfaction Surveys</b>	<b>2/1/21</b>	<b>2/12/21</b>	<b>10 days</b>					
179	<b>3.7 Materials</b>	<b>1/4/21</b>	<b>2/5/21</b>	<b>25 days</b>					
192	<b>4 Telecommunications Phase</b>	<b>12/21/20</b>	<b>3/1/21</b>	<b>51 days</b>					
193	4.1 Phone system configuration	12/21/20	1/22/21	25 days					
194	4.2 Configure telecom (SBC)	1/25/21	1/26/21	2 days					
195	4.3 Configure networking	1/27/21	1/28/21	2 days					
196	4.4 Configure monitoring	1/29/21	2/1/21	2 days					
197	4.5 Configure screen capture	2/2/21	2/3/21	2 days					
198	4.6 Secure FTP	2/4/21	2/5/21	2 days					
199	<b>4.7 ACD</b>	<b>1/4/21</b>	<b>1/22/21</b>	<b>15 days</b>					
210	<b>4.8 TDD/TTY</b>	<b>2/1/21</b>	<b>2/2/21</b>	<b>2 days</b>					
213	<b>4.9 RespOrg Documents</b>	<b>2/1/21</b>	<b>3/1/21</b>	<b>21 days</b>					
216	<b>5 IT</b>	<b>12/7/20</b>	<b>3/3/21</b>	<b>63 days</b>					
217	<b>5.1 Azure Environment</b>	<b>1/25/21</b>	<b>1/25/21</b>	<b>1 day</b>					





# West Virginia Managed Care Enrollment Brokerage Services Draft Implementation Plan\*

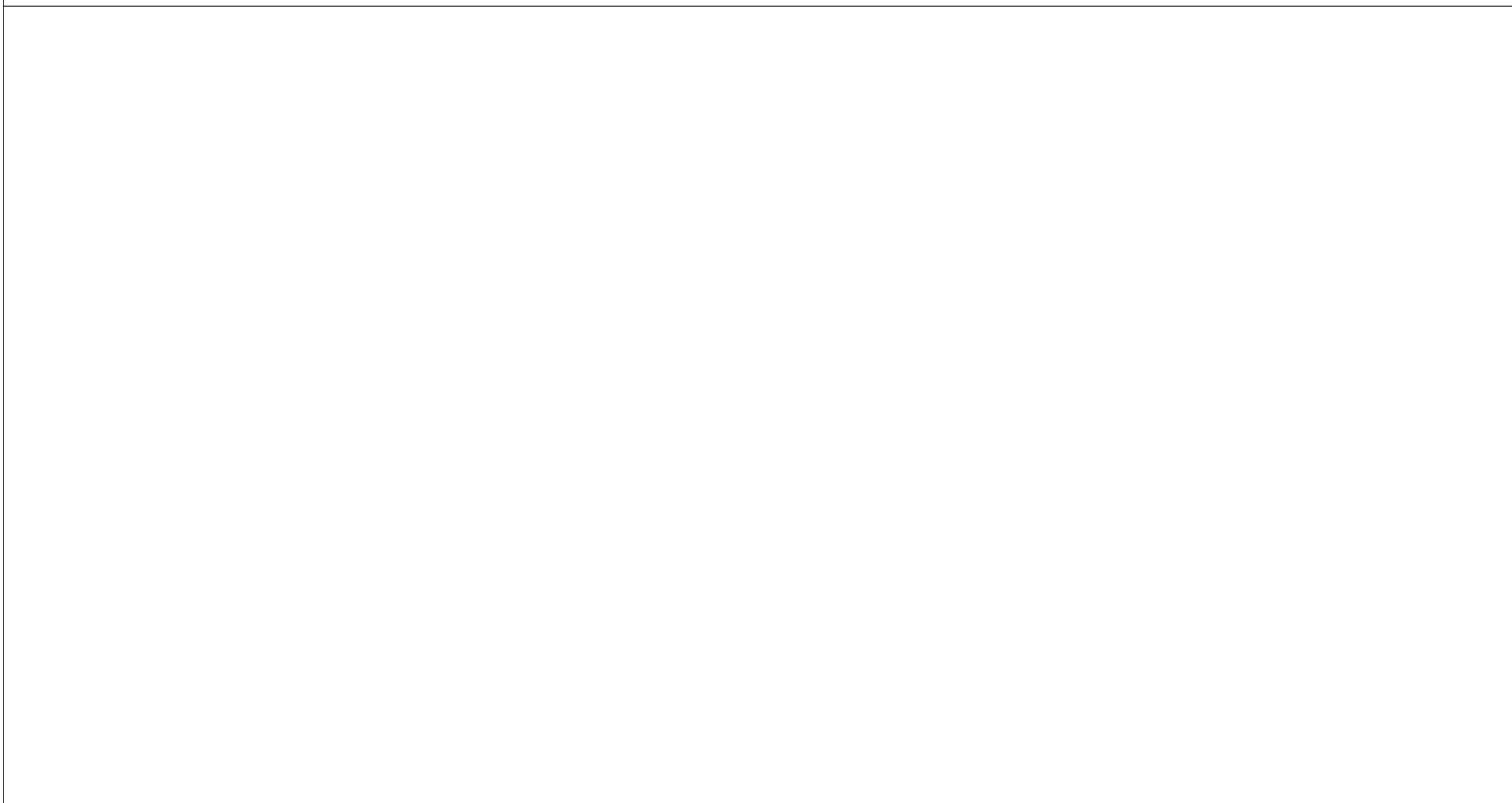
ID	Task Name	Start	Finish	Duration	Dec	Qtr 1, 2021 Jan	Feb	Mar	Qtr 2, 2021 Apr
223	<b>5.2 HealthTrack CRM</b>	<b>12/21/20</b>	<b>3/1/21</b>	<b>51 days</b>					
224	5.2.1 Deploy HealthTrack Core for customization	12/21/20	12/21/20	1 day					
225	5.2.2 Program case screen	12/22/20	12/28/20	5 days					
226	<b>5.2.3 Customize Modules</b>	<b>12/22/20</b>	<b>1/15/21</b>	<b>19 days</b>					
249	5.2.4 Develop CTI for CRM (screen pops, verification)	1/11/21	1/22/21	10 days					
250	<b>5.2.5 Roles and Permissions</b>	<b>2/22/21</b>	<b>3/1/21</b>	<b>6 days</b>					
254	<b>5.2.6 Knowledgebase</b>	<b>2/15/21</b>	<b>2/22/21</b>	<b>6 days</b>					
257	<b>5.2.7 Mail Console</b>	<b>2/8/21</b>	<b>2/25/21</b>	<b>14 days</b>					
262	<b>5.3 Connectivity</b>	<b>2/8/21</b>	<b>2/15/21</b>	<b>6 days</b>					
265	<b>5.4 Website/Web Application</b>	<b>12/7/20</b>	<b>2/24/21</b>	<b>58 days</b>					
284	<b>5.5 Provider Directory</b>	<b>1/18/21</b>	<b>1/29/21</b>	<b>9 days</b>					
290	<b>5.6 Reports</b>	<b>12/7/20</b>	<b>2/5/21</b>	<b>45 days</b>					
302	<b>5.7 Testing</b>	<b>2/15/21</b>	<b>3/3/21</b>	<b>13 days</b>					
306	<b>6 Monitoring</b>	<b>12/2/20</b>	<b>2/26/21</b>	<b>63 days</b>					
307	<b>6.1 Weekly Status Meeting</b>	<b>12/2/20</b>	<b>2/24/21</b>	<b>61 days</b>					
321	<b>6.2 Distribution of meeting minutes and updated project plan</b>	<b>12/4/20</b>	<b>2/26/21</b>	<b>61 days</b>					
335	<b>7 Readiness Review</b>	<b>2/24/21</b>	<b>3/3/21</b>	<b>5 days</b>					
336	7.1 Conduct readiness review	2/24/21	3/3/21	5 days					
337	7.2 Transfer toll-free and TTY numbers	3/2/21	3/3/21	1 day					
338	7.3 Go-Live	3/3/21	3/3/21	0 days					







# West Virginia Managed Care Enrollment Brokerage Services Draft Implementation Plan\*



Task		Inactive Task		Manual Summary Rollup		External Milestone	
Split		Inactive Milestone		Manual Summary		Deadline	
Milestone		Inactive Summary		Start-only		Progress	
Summary		Manual Task		Finish-only		Manual Progress	
Project Summary		Duration-only		External Tasks			