West Virginia Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

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.

wvOASIS

Jump to: FORMS | Go | Home | Personalize | Accessibility | App Help | About

Welcome, Lu Anne Cottrill

Procurement | Budgeting | Accounts Receivable | Accounts Payable

Header 3 | List View

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

Procurement Folder: 909208	**SO Doc Code:** CRFQ
Procurement Type: Central Master Agreement	**SO Dept:** 0511
Vendor ID: VS0000038555	**SO Doc ID:** HHR2200000001
Legal Name: Planstree Inc.	**Published Date:** 8/9/21
Alias/DBA: PlanStreet Inc	**Close Date:** 8/19/21
Total Bid: $60,000.00	**Close Time:** 13:30
Response Date: 08/19/2021	**Status:** Closed
Response Time: 13:27	**Solicitation Description:** STATEWIDE CASE MANAGEMENT SYSTEM
Responded By User ID: Planstreet	**Total of Header Attachments:** 3
First Name: Aon	**Total of All Attachments:** 3
Last Name: Rana	
Email: ayesha.ahmed@planstre	
Phone: 800-859-5407	

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:	909208
Solicitation Description:	STATEWIDE CASE MANAGEMENT SYSTEM
Proc Type:	Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2021-08-19 13:30	SR 0511 ESR08192100000001215	1

VENDOR

VS0000038555
Planstree Inc.

Solicitation Number: CRFQ 0511 HHR2200000001

Total Bid: 60000   **Response Date:** 2021-08-19   **Response Time:** 13:27:30

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	Enterprise system management software				0.00

Comm Code	Manufacturer	Specification	Model #
43232304			

Commodity Line Comments: SQL server licensing is included in the software licenses fees

Extended Description:

Phase 1 - pre-operational

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Computer software licensing service				40000.00

Comm Code	Manufacturer	Specification	Model #
81112501			

Commodity Line Comments: Includes SQL server database cloud

Extended Description:

Software Licensing Fees

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Database management system software maintenance				20000.00

Comm Code	Manufacturer	Specification	Model #
81112205			

Commodity Line Comments:

Extended Description:

Modifications and Enhancements, Support

PlanStreet Case Management Software

Submitted for:

Table of Contents:

August 19, 2021

Crystal Hustead
Bid Clerk
The Foster Care Ombudsman

Dear Crystal,

On behalf of PlanStreet Inc. we appreciate the opportunity to submit this proposal to The Foster Care Ombudsman(FCO), for Case Management Software, as referenced within the CRFQ 0511 HHR2200000001. The PlanStreet team comprises experienced case managers, project managers and business leaders from a variety of industries. Our team's diverse experience lends unique insight to the various needs of case managers and large scale projects.

This experience has led to the development of a flexible case management software that enhances efficiency and ultimately creates a better experience for clients. We serve several medium to large organizations focusing on Reentry programs, social case management and homeless management programs across the globe.

The PlanStreet Team looks forward to the opportunity to earn your business, develop strong working relationships, and lead you through this process successfully. Please feel free to contact me if you have any questions or would like further information. I can be reached at 800-859-5407, or via e-mail at sales@planstreetinc.com

Sincerely,

Barbara harnish

Barbara Harnish
Chief Financial Officer
PlanStreet Inc.
800-859-5407
E: sales@planstreetinc.com
W:www.planstreetinc.com

Executive Summary

PlanStreet Inc. is an innovative software development firm based out of picturesque Lexington, Kentucky. We take pride in our comprehensive case management software that seeks to automate manual processes and provide easy access to the information you need no matter where you are.

Our team of professionals brings extensive knowledge and experience focused on the business of higher education and academic medical centers. We deliver the most comprehensive services to the industry and partner with institutions to improve business performance across the enterprise.

PlanStreet's business philosophy is built on the foundation of providing exceptional service delivery and competitive pricing to our customers. We value the close working relationships we've developed with our customers, as we endeavor to earn trust and serve as strategic business advisors. We work with public and private organizations, and independent research foundations of all sizes in virtually every core business function. Our team's focus on performance improvement provides institutions with comprehensive strategic, operational, and technology solutions that enable our clients to succeed and thrive in this new era of change.

Scalable and Secure for Meeting Complex Needs

PlanStreet's case management software is tailor-made for social, healthcare and human services organizations. It eliminates manual processes and paperwork providing caseworkers a safe and secure platform. PlanStreet provides an unprecedented level of performance, security, and scalability by using the best hosting platform, Microsoft Azure cloud. The case management software is comprehensive enough to include robust security and HIPAA compliance needs.

Our case management software automates manual processes and forms. Access it from the office, your home or the field, wherever you are. Caseworkers, service providers and other stakeholders can easily use the software and access the important data related to them.

Why PlanStreet

We focus on Child & Family case management , Patient case management, Reentry program management and Homeless Management (HMIS) along with industry standard reports and integrations. We value diversity and our team comprises a diverse array of experts with case management experience. One commonality across all our projects and employees is the drive to grow and excel, which has allowed PlanStreet to take pride in our exemplary track record.

We believe PlanStreet is uniquely qualified to provide superior services because:

- Our sole focus is on service delivery efficiency and effectiveness, as well as quality and success;

- The most significant advantage is its flexibility to adapt to new processes, changing requirements, and individualistic needs.

- It streamlines business processes and enhances organizational efficiency.

- Being a cloud-based management software, you can access it and work from anywhere, home, or office.

- Since case management software alerts everyone when tasks are completed, it saves time for staff to perform other duties.

- PlanStreet helps in the analysis of generated reports, analyze trends, and quickly solve fraud cases and forward compliance reports.

- It helps organizations understand which actions are result oriented and which actions need to be curtailed or stopped.

- PlanStreet keeps all files safe and secure by regularly backing up the data automatically every few hours.

We are Certified

PlanStreet's case management software is HIPAA, NIST and FedRAMP compliant. A firm or an organization lacking strategy is organized, managed, and motivated to get only the results it already currently realizes. For leaders to get what they strategically desire, the organization must change. Effective leaders have zero tolerance for the status quo. The leader's primary role

is to lead transformational change—first to determine direction and then to communicate, organize, develop, motivate, and inspire followers to achieve the vision.

PlanStreet provides an unprecedented level of performance, security, and scalability by using the best hosting platform, Microsoft Azure cloud. The case management software is comprehensive enough to include robust security and HIPAA compliance needs.

PlanStreet Case Management Software for Patient and HealthCare

PlanStreet Health and patient service organizations serve as intermediaries and advocate on behalf of their clients. They are instrumental in making sure that populations in need of assistance are able to get the funds, care, and understanding they need to better their lives. Examples of the life-changing programs that health and patient service organizations provide include but aren't limited to Maternal Infant Early Childhood Home Visiting (MIECHV) and Substance Abuse Prevention and Treatment Block Grants (SABG).

A key tool that health services organizations use in care management is patient care management software. So, what exactly is patient services case management software and how does it benefit an organization?

PlanStreet understands that Patient Care is very important.

Your time should be devoted to care management. Too much time processing paperwork means the patient isn't the full focus. With PlanStreet's health care case management software, patient care and health services can be simplified, updated in real-time, and shared by the health services organizations involved in each individual's case. All care management team members can see the entire case at a glance. Go right to the area you need to view or complete with tremendous ease. Nothing is ever more than a click away.

Efficiency	**Invoicing**
Medicaid	**Scheduling**
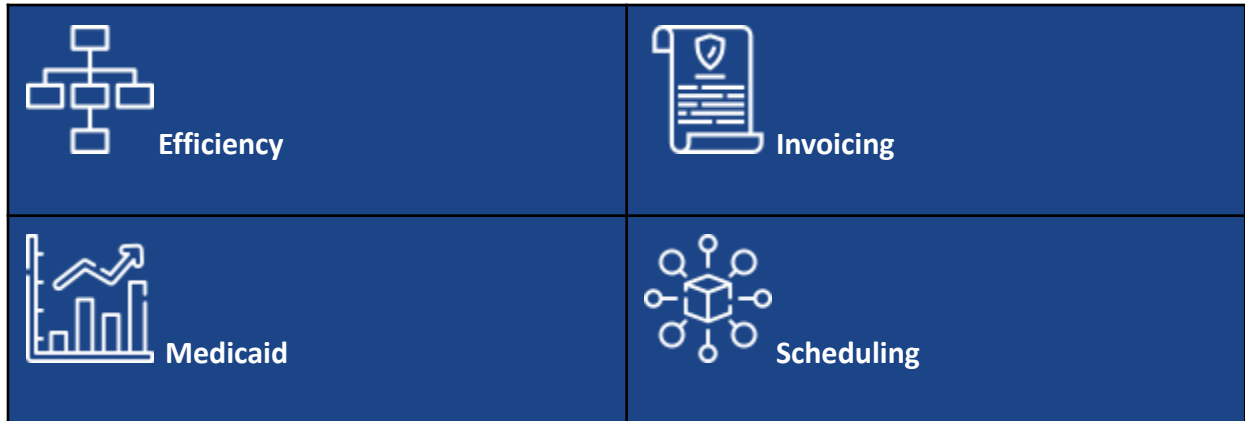
Features and benefits of our software

- **Organization**
  A seemingly endless amount of paperwork and client data is generated when working in health services. This paper trail is important for documentation and tracking a client's progress. Patient services case management software can store and organization this information for quick and efficient access.

- **Security**
  With all the information that is gathered, keeping that data safe and secure becomes a significant responsibility. Patient service software keeps your data password protected and backed up at all times. Your organization can sleep soundly knowing that client information is secure.

- **Productivity**
  Every team should be seeking to enhance productivity. By keeping track of dependencies, tasks, and allocated resources, patient services software ensures that your team's time is used to its fullest extent.

- **Compliance**

   Health care work is fraught with red tape and compliance issues. Organization and security help to maintain compliance with state, local, and federal regulations.

- **Patient outcomes**

   The end goal of a health services organization is to impact the lives of patients and patient service software helps your team every step of the way. By improving every aspect of client processing, achieving your client's goals is that much easier.

- **Reporting**

   Consistent and transparent reporting is required to obtain and sustain grant funding. Patient service software not only tracks the information that you are responsible for, but it can also output this data in customizable report formats. Stakeholders at every level will have the information they need in their hands.

Key Components

Intake

This is the initial step in building strong case management. It involves a meeting between a client and a case manager where the latter gathers maximum information possible by discussing it with the client, identifies their needs, and documents it in PlanStreet's intake form and case management software.

Needs Assessment

This step involves the details gathered during the Intake stage using PlanStreet. The manager's responsibility during this stage includes making an understanding with the client to have an in-depth knowledge of upcoming challenges and to know more about their goals to provide efficient service.

Service Planning

The case manager, considering every resource and information gathered by the client in previous steps, takes action and supports the client's requirements. The manager must plan each step and set targets and goals for the team using PlanStreet.
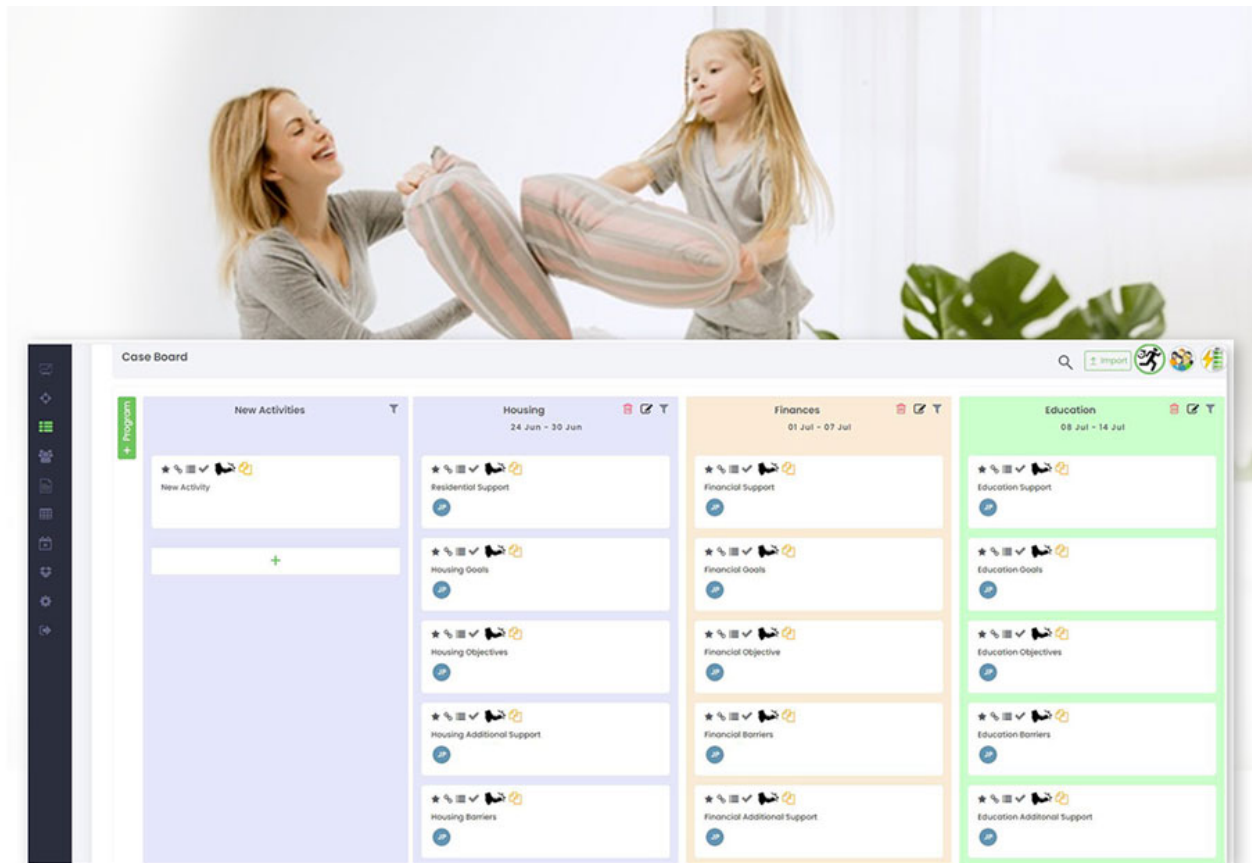
Monitoring and Evaluation

Every service delivered to a client must be properly evaluated and monitored with time using PlanStreet. By doing this, one can ensure the level of satisfaction and feedback of a client. Evaluation is essential to know how your service has made an impact on your client.
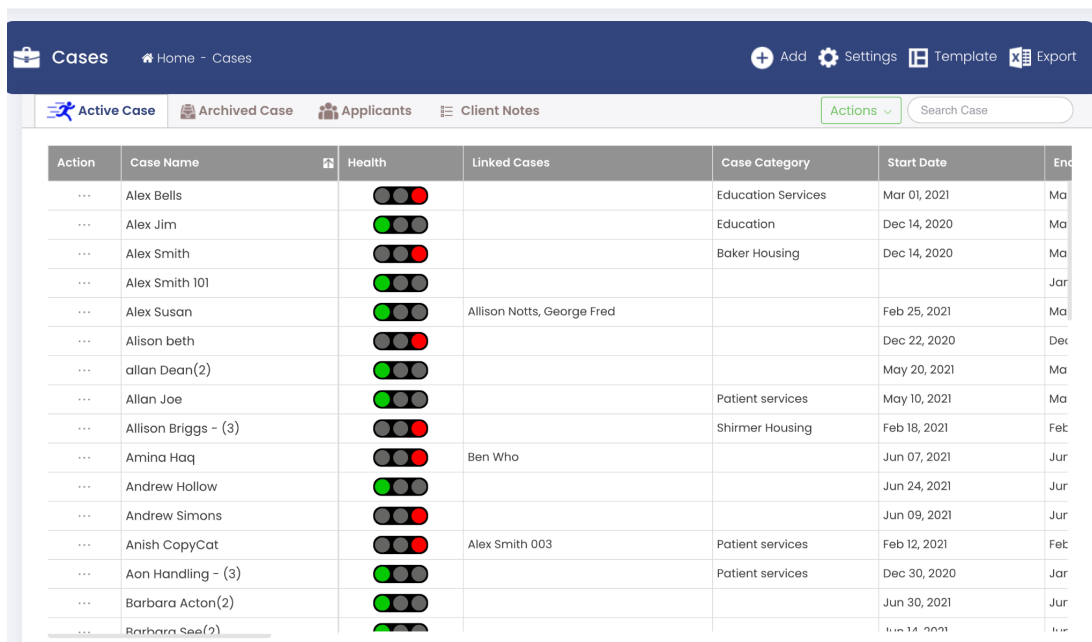
Key Features

Case Management & Service Delivery

Managing case data, program management, and service delivery in one place. Track the full lifecycle of case management and service delivery success with PlanStreet. Nonprofit organizations can build programs that provide useful and sustainable services for existing and future members.

Forms, Workflows, Approvals & Alerts

Digital forms can be configured in PlanStreet as needed, comprising time-saving data validation and conditionality features. It simplifies processes through intuitive workflow, alerting, and digital signature features. Easily share data and integrate among systems with our open API and automated file transfers.

Configurable Dashboards

PlanStreet allows customers end-to-end views through configurable dashboards. Our useful reporting dashboards help planning services and programs with intuitive user experience and guide plans on the right course by making specific recommendations.

Compliant, Best Practice Configurations

PlanStreet helps your nonprofit accelerate its impact by evaluating and managing outcomes. It also helps in aligning the mission with the desired results at an organizational level. PlanStreet's Case Management software leads to an outcome where every participant receives the services he/she needs to reach its goals.

Client Notes

Group Notes/Comments

Client Portal

PlanStreet's non-profit client portal is the tool your organization needs to take the next step. The work your team does directly impacts the lives of your clients. You and your clients deserve the best tools available.

Efficiency	Accessibility	Collaboration
Clients can complete and submit forms online reducing laborious paperwork	Forms are stored right in client case files making them easily accessible in the moment	-Through messaging and comment features, clients can communicate directly with case managers
Scheduling	**Update**	**Review**
Every client has a different availability and PlanStreet's client portals allow them to schedule appointments with case managers when it makes the most sense for them	Maintain up-to-date demographic information on your client base by empowering clients to update contact information and other pertinent information	Case management teams can download and share in-process documents for efficient collaboration
Invoicing	**Payments**	**Maintenance Request**
invoices directly to clients and avoid the delay of traditional mail	Maintain up-to-date demographic information on your client base by empowering clients to update contact information and other pertinent information	Clients can submit requests for maintenance with just a few clicks in on their donor portal and expedite service needs.Maintain up-to-date demographic information on your client base by empowering clients to update contact information and other pertinent information

Key Features

- **Client Portal Security**
  Keeping client data secure is a top priority. PlanStreet uses data encryption and permissions to make sure that only those authorized to have client data have access to it. Your non-profit organization's reputation and your ability to serve society depend largely on your ability to earn and maintain public trust. Client data security is the first step.

- **Document Collaboration**
  The ability to instantly share and collaborate on documents is a key feature of PlanStreet's

client portal. No more waiting on standard mail or burdensome email attachments. Shared documents can be placed right in the client portal, reviewed by both parties, and signed off electronically. The process is quick, efficient, and secure.

- **Electronic Bill Sharing**

  Virtually any bill can be paid online these days. Why would the valuable services your organization provides be any different? PlanStreet's online client portal makes it easy to post invoices where clients can log in and pay them. Timely and organized payments have become a reality!

- **Compliant, Best Practice Configurations**

  PlanStreet helps your nonprofit accelerate its impact by evaluating and managing outcomes. It also helps in aligning the mission with the desired results at an organizational level. PlanStreet's Case Management software leads to an outcome where every participant receives the services he/she needs to reach its goals.

- **Task Sharing**

  Clients seek out non-profit organizations for their help and this help is modeled by PlanStreet's very client portal. Tasks and forms that need to be completed can be divided and tracked so that their progress doesn't fall behind. Case managers are able to login and see exactly where a client is in relation to a deadline!

PlanStreet RESTful API

PlanStreet offers a fully RESTful API for customers, 3rd party developers and partners to build on top of and customize their PlanStreet experience to their exact needs. Our case management API lets developers and users create custom extensions within the PlanStreet system. Create cases, extract case and contact information, update or deactivate information from within your PlanStreet installation.

We also offer compatibility with a variety of 3rd party software such as HMIS, CRM, Microsoft, Google and Business Intelligence applications for bi-directional integration with PlanStreet.

API Method Types:

• Post
• Get
• Put
• Delete

Authentication:

All users must be authenticated if they want to send any request to the PlanStreet endpoint. Successful authentication request would result in a token which will be used to validate the requests. Token validity is 24 hours.

Data Migration

PlanStreet roll out team assists new and existing customers to migrate off legacy and 3rd party systems. Most PlanStreet database migration projects follow initial PlanStreet implementation, but database migration projects aren't always limited to new users.

Data migration scenarios:

- Move from a legacy database system or Excel spreadsheets to PlanStreet software and need to bring historical data into your new PlanStreet database.
- Update forms, links, or fields in PlanStreet and need to move existing data to the updated structure. Data migration projects are almost always required when existing data is present in PlanStreet and updates are made to the forms, links, and fields holding that existing data.
- Import data from another database software system into your PlanStreet database. Use PlanStreet imports to integrate external software systems.
- Redesign the form, field, and linking structure of your existing PlanStreet database as part of a reimplementation project. Although reimplementation projects are less common than the other scenarios, sometimes a PlanStreet database needs an overhaul. A reimplementation project builds new forms parallel to your existing PlanStreet database and migrates data from your existing structure to the new structure.

Data migration approach:

Data migration projects will generally include these phases:

- **Preparation** – Complete an assessment of the PlanStreet database structure to identify forms and links; prepare expectations and set up the database for the data migration
- **Discovery** – Develop a data migration blueprint to translate legacy database objects and fields to PlanStreet forms, links, and fields
- **Mapping** – Map legacy data fields in Excel to PlanStreet import templates using the data migration blueprint as a guide
- **Import** – Import formatted data files into PlanStreet based on the data migration blueprint for both records and links (records and links are separate imports in PlanStreet and should be accounted for in the Preparation and Discovery phases listed above)
- **Review** – Review and confirm data migration accuracy based on the blueprint using PlanStreet reports and searches

Data migrations can enhance PlanStreet reporting (more data equals more context), but migrating all data isn't always the right decision. That is why it is important to determine whether the data you want to migrate is actually useful to your organization.

- Do we use this data in our current reports?
- Will end users and managers review this data?
- Is this data being used for decision-making? If yes, how so?

If the data is being used currently and has a functional and strategic purpose, there is a clear case for moving the data to PlanStreet, but holding onto historical data that isn't being used is a waste of resources. Only manage, maintain, and support data that is relevant. There is no need to migrate data that isn't useful or that adds no value to you.

Integrations

PlanStreet offers native Integration with the following applications:

Organize, Manage, and Review your expenses, income, donations and other business financials in one place by integrating Planstreet with QuickBooks.
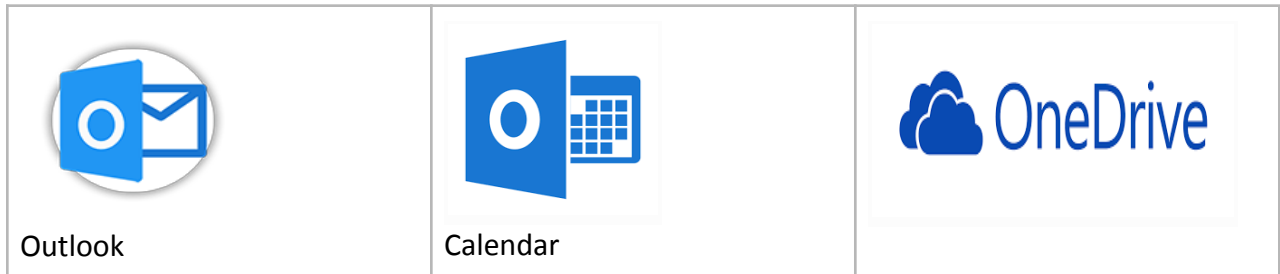
Outlook	Calendar	

Outlook Calendar

Integrate Outlook with PlanStreet to send and receive information about a project or task from the same application you use to actually perform tasks will save you valuable resource time.

	Google Calendar	Google Drive
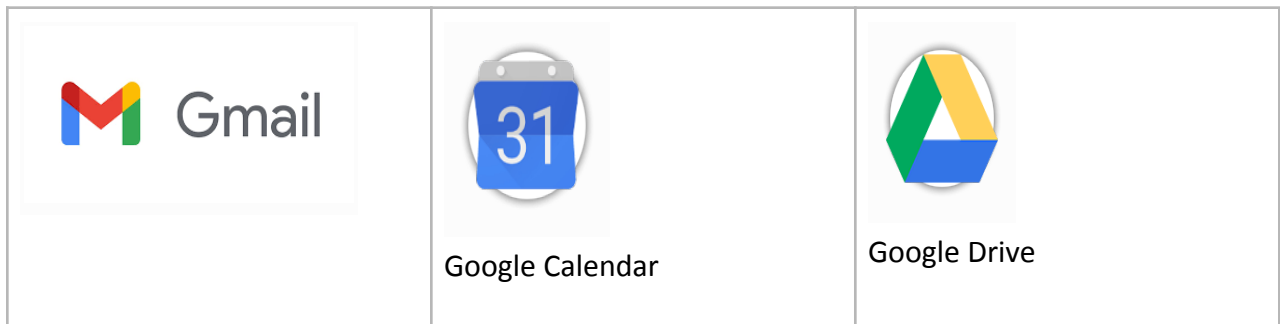
PlanStreet's integration with Google Calendar will save your valuable time. You can now manage, review, and organize your day to day activities without having to leave your system.

You can now manage and organize your google drive from PlanStreet. You can perform all the activities like adding, deleting, or sharing files/folders with other resources from within the system.

Microsoft Teams

You can manage projects, tasks, task statuses, and dashboards from within MS Teams. Integration with MS Teams helps you connect with your dispersed and remote team and also stay focused on PlanStreet.

Single Sign On

PlanStreet SSO (Single Sign-on) is a user authentication service or a session which allows users to use a single set of login credentials to access several applications.

Payment Integrations

PlanStreet offers integrations with Paypal, Stripe and Square to accept donations and payments.

Mobile Applications

PlanStreet has native mobile applications for Case Management in Android and IOS.

Stay Connected on the go!
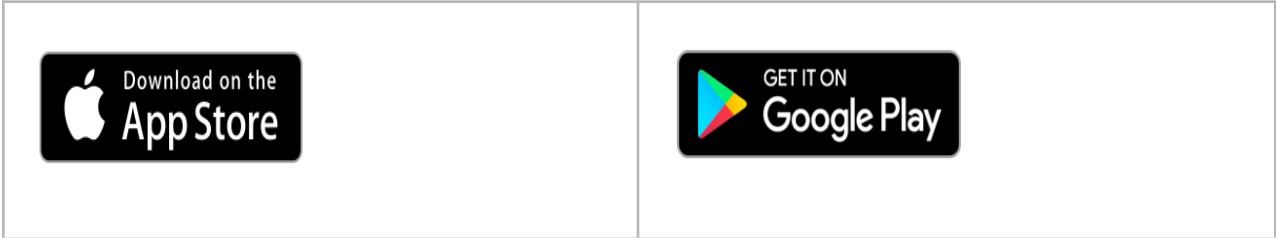
Track Record Of Success

PlanStreet has an unrivalled success record. In our history of success, PlanStreet's case management software has been implemented at the following nonprofit organizations:

PlanStreet Case Management Clients

Company Overview:

Full Legal Name	PlanStreet Inc.
Office Address	**Kentucky Office:** 348 East Main Street, Lexington, Kentucky 40507 800-859-5407
Contact Person	**John McGovern** Account Manager john.mcgovern@planstreetinc.com 832-729-5273
Year of Incorporation	2015
Number of Employees	100+

Client References

	Reference 1	Reference 2	Reference 3
Organization name, location, and type.	**Erie County**	**City of Jersey City**	**Sarpy County**
Description of system installed (include module(s) and version(s)	Implementation of PlanStreet Case Management Software, Client portal, online forms, Intake forms. Integration with Student Management System, Data migration and templates setup.	Implementation of Case Management Software and client portal. Integration with Ms Teams, Intake Forms, Monthly rent collection system. Data migration and work order management for the properties.	Implementation of Case Management Software, Affordable housing system, Client portal. Integration with Google SSO and Ms Teams. Intake Forms, Monthly rent collection system.
The date operations began on the system.	06/08/20	05/12/20	05/15/20
Operational statistics (i.e. transaction volumes, # users, etc.)	1000 Clients	1000 Residents	1200 Residents

Project Management Approach

This approach is for PlanStreet Case Management Cloud to cover implementation of standard/out of the box features and other tasks like integration, data loads and any other project specific documentation and training.

This approach has 5 phases:

1. Project Design
2. Configure
3. Validate
4. Transition
5. Realization

This is the detailed Project Implementation flow:

Project Design	Configure	Validate	Transition	Realization
Plan Project	Setup Application	Update Settings	Migrate Configuration to Production	Manage Transition to Steady State Operations
Conduct Kick Off Meeting	Validate Configuration	Prepare Validation Scripts	Migrate Integrations & Extensions to Production	
Schedule Workshops	Load & Validate Integrations	Load & Validate Data	Load Reconcile & Validate Data in Production	Post Go-Live Support
Conduct Functional Design Workshops	Build & Validate Integrations	Conduct End-to-End Review	Conduct Final Validation Review	
Conduct Technical Design Workshos	Apply & Validate Extension & Extensible Items	Prepare for Training	Verify Production & Operational Readiness	Handoff to Customer Relationship Manager
Conduct Design Review	Implement Security	Conduct Train-the-Trainer Workshops	Begin Production Use	Gain Acceptance
Develop Security and Validation Strategies & Plans	Prepare Cutover Strategy	Conduct Implementation Checkpoint	Conduct Implementation Checkpoint	Close Project
Conduct Implementation Checkpoint	Conduct Implementation Checkpoint			

Team Profiles

Managing Partner		
Aon Rana		▪ Project Role – Program Manager ▪ 20+ years in Software Implementations ▪ Strategy and Implementation Expertise ▪ Case Management experience

Aon is a seasoned project management professional with extensive experience in implementing software applications across various industries. Highly experienced working with functional and technical implementation professionals. He has successfully led and delivered projects in Nonprofits, Higher Education, Healthcare and Public sector. An expert in agile Project Management methodology and PlanStreet apps cloud approach with hands on experience in Change Management with several global successful implementations.

Highly experienced in working with functional and technical implementation professionals. Aon is able to group unique skill sets together to accomplish satisfactory results and has excelled in the advisory and consulting around leading Case and Client Management Systems. He has successfully led and delivered consulting projects in Nonprofits, Higher Education, Healthcare and Public sector. He has expertise in agile Project Management methodology, Business Process reengineering and Change Management. Aon is well versed with Nonprofits and Public sector business processes and has assisted them with re-engineering and optimization of Client Intake, Needs Assessment, Service Delivery and Outcome Tracking.

Education
National University of Singapore, Post Grad
University of Nottingham, BSC (Hons) Economics

Director Higher Education		
Outi Cornette		▪ Project Role – Projects Manager ▪ 30 years in Software Implementations ▪ Change Management Expertise ▪ Case Management experience

Outi helps organizations realign complex and insufficient processes to free up people, time, and money for truly critical and meaningful projects.

Outi has a proven history of identifying the root causes of issues that cause project delays, poor delivery experiences, low morale, and lack of trust between teams across the organization. Using her knowledge of ITIL, LEAN, and Six Sigma Green Belt, she learns the as-is processes by talking with team members, and she identifies the to-be based on available tools and people.

By sharing the to-be vision with the teams, she creates collaboration and acceptance for the changes so that by the time those changes are rolled out, people feel comfortable with them and adapt to them quickly. The changes may include moving work to remote teams, new standardized forms, and streamlined processes with limited number of touch points.

She has a reputation of getting done what she says she will do, and knowing whom to ask if she doesn't know the answer to a question. She mentors and coaches team members with the sole purpose of helping them experience the same success and joy at work as she has, and she loves watching them excel beyond what they thought was possible.

Industry Expertise

1. Requirements Analysis
2. Enterprise Architecture
3. Business Analysis
4. Requirements Gathering
5. SDLC
6. ITIL
7. Agile Methodologies
8. Lean Six Sigma
9. Software Project Management
10. Agile Project Management

IT Project Manager		
Sean McLaughlin		▪ Project Role – Student System Expert ▪ 12 years in Technology Projects ▪ Strategy and Programing ▪ Project Management experience

Sean is a senior IT Project Manager with 12 years of success leading all phases of diverse technology projects; and ten years of programming and enterprise system admin lead. He is our lead PMO strategist responsible for planning and aligning business goals with SDLC implementations to drive process improvements, transparency, and faster delivery cycles. He has excellent communication skills and leverages technical and business acumen to communicate effectively with business sponsors and their respective teams.

Sean is an expert in Agile, Kanban, DAD, scrum and waterfall project management methodologies. He is able to manage multiple, dispersed, large project teams and known for high-quality deliverables that meet timeline and budgetary targets.

Skills Summary:

- Project Management: Commercial SW R&D, Web, SaaS, Mobile, Infrastructure, Networks, Virtualization, Hosting, Integrations/Migrations, PMO, Acquisitions.
- Project Lifecycle: Requirements Analysis, Scheduling, Reporting, ALM, TDD UAT/ QA/ Deployment/ Support.
- Value-Added Leadership: SDLC Workshop Instructor, Remote Geo and Distributed Team Leadership, Cross-Functional Supervision, Team Building & Mentoring, SME Consultant, Planning, Vendor Management.

Education:

University of Kentucky, BS Computer science

Client Success Manager		
Brian Eads		▪ Project Role – Client Success Manager ▪ 15 years in Technology Projects Support ▪ Strategy and Programing ▪ Project Management experience

Brian is a Client Success Manager with 15 years of success leading all phases of diverse technology projects; and ten years of programming and enterprise system admin lead. Manages daily department operations including staffing, training, scheduling and evaluations. Responsible for Vendor relationships, development and evaluation. Product roadmap, testing, and implementation in live environments for customer facilities. Strategic planning and development of Standard Operating Procedures. Mentoring, coaching, and team development.

Project Management for multi state, multi company projects. Provided on site customer service and Project Management services. Evaluates customer needs and presents a clear road map of solution implementation. Trained staff on best practices and operating procedures. Maintained customer relationships, and updated solutions as needed. He is our lead client success manager responsible for planning and aligning business goals with SDLC implementations to drive process improvements, transparency, and faster delivery cycles. He has excellent communication skills and leverages technical and business acumen to communicate effectively with business sponsors and their respective teams.

Skills Summary:

Customer Services
Project Management
Analyzing business problems
Data analysis
Presenting business insights
SQL & Python
Data visualization

Education:

Strayer University- Kentucky, Master of Business Administration
University of Kentucky, BA Telecommunications

Training Plan

PlanStreet proposes to conduct End User Training with a focus on improving the adoption of the system. Training is not a one-time activity during the validation phase, but is a continuous process that will continue during the Validation and Transition phases. The PlanStreet team will also cascade and validate all user documentation developed as part of the training cycle. The PlanStreet training strategy will include competency testing that will be required for all users to complete to certify all users are proficient, and have adequate knowledge to operate the system according to each user's functional role.

Purpose

The purpose of the Training Plan is to describe the processes and timeline by which training will be delivered to all Users of the new Implemented System.

Goal

The objective of the Training Plan is to ensure all personnel understand the necessity and practice of using the application properly for maximum benefit. The goal of PlanStreet Training is to ensure that concerned personnel are provided with the technical skills and procedural knowledge necessary in order to successfully conduct this project in an effective and efficient manner.

Objectives

The objective of the training plan shall be to train individuals and team to:
- Understand the working of the New System and to use it in the desired fashion.
- Recognize practices and implement standards throughout the organization.
- Identify and deliver organizational change, navigation, and application training.
- Identify end-users to be trained to meet respective go-live dates.
- Prepare end-user training materials that will serve as a desk reference.
- Evaluate the effectiveness of the training experience to improve the process.
- Keep informed of the threats to, and vulnerabilities of the systems.
- Take necessary measures to protect information generated, stored, processed, transferred, or communicated by information systems.
- Educate end users about the comprehensive and systematic business process approach.

Methodology

All users, trainers, and support personnel will need training and/or resources at different levels. Comprehensive training is a critical requirement for all persons central to the implementation

process. Training will be intense in different modules and careful planning and scheduling will be necessary.

Several levels and types of training are required and will be scheduled at the appropriate times during the implementation period. The Training plan shall identify the activities, resources and timelines associated with the end-user training, including the Training presentation, User Manual content, and online end-user training sessions.

Support and Technical Assistance

We offer support via Chat, email and phone. PlanStreet's support service will provide fast problem resolution, with priority handling of service requests and preferred access to our functional and technical support staff. With our support, any service requests and bugs submitted by Client receive priority handling and routing to the most appropriately skilled analyst. PlanStreet's Technical experts respond to customer production-critical issues quickly and work around the clock until the issues are resolved.

Constant Access to On-line Support Tools
As a PlanStreet customer, The Foster Care Ombudsman will have constant access (24 hours a day, 7 days a week, 365 days a year) to our on-line support tools and resources via our website.

Monthly Reporting
PlanStreet will email the The Foster Care Ombudsman a monthly report that includes a description of customer issues, status of issues, priority levels recorded, disposition of issues, service levels achieved, and other general information to assist the The Foster Care Ombudsman's Project Manager in the ongoing support of the The Foster Care Ombudsman.

Software Updates and Critical Bug Fixes
PlanStreet will provide regulatory change updates and documentation as well as critical bug fixes. To further provide The Foster Care Ombudsman with a consistent response, we have implemented the Priority Service Level Standard based on severity indicators with the following targets:
- Severity 1 Service Requests: 90 percent (%) response within 1 hour (Monday- Friday).
- Severity 2 Service Requests: 90 percent (%) response within 5 business hours.
- Severity 3 Service Requests: 90 percent (%) response by next business day.
- Severity 4 Service Requests: 90 percent (%) response within a week.

Staff:

Resource	Quantity	Duration
Project Manager	1	4 months
Functional Consultant	2	4 months
Data Migration Resource	1	3 months

Project Timeline:

Month 1
1) Kick off meeting- Data Request, Identify Custom Requests, identify Reports
2) System admin training- Create Intake, Create Forms, Create Program Templates
3) Data element mapping for Migration and Reports

Month 2
1) Formatting and mapping of data/documents transitioning from other software systems
2) Project configuration
3) System configuration

4) End user training- Workflow Training
5) All data elements migrated and available in live-site- verify data was moved to live correctly
Month 3
1) Custom Data elements (services, notes, contacts, etc.) migrated and available in live-site
2) Case Management data migrated and available in live-site
Month 4
1) System Integration Testing
2) Reports testing and available in live-site
3) Go-live in new system

Project Financials:

Sr no.	Item Description	Units	Unit price	Price USD
1)	PlanStreet Case Management Software Annual Subscription	50 users*	$600/user/year	$30,000
2)	Client Portal Access (bi-directional)	1	$10,000/year	$10,000
3)	Roll out services (one time) Services including training will be provided via Ms Teams, phone calls and emails from Kentucky office	1	$20,000	$20,000
	Grand Total: Sixty Thousand only			**$60,000**

*Additional Software Licenses will be charged at $50/user/month billed annually.

Proc Folder:	909208	**Reason for Modification:**
Doc Description:	STATEWIDE CASE MANAGEMENT SYSTEM	ADDENDUM 1 TO PROVIDE ANSWERS TO VENDOR QUESTIONS
Proc Type:	Central Master Agreement	

Date Issued	Solicitation Closes	Solicitation No	Version
2021-08-09	2021-08-19 13:30	CRFQ 0511 HHR2200000001	2

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code:

Vendor Name :

Address :

Street :

City :

State :   **Country :**   **Zip :**

Principal Contact :

Vendor Contact Phone: **Extension:**

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

ADDITIONAL INFORMATION

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR AN ENTERPRISE LEVEL, CLOUD-BASED, STATEWIDE CASE MANAGEMENT SYSTEM PER THE ATTACHED DOCUMENTS.

QUESTIONS REGARDING THE SOLICITATION MUST BE SUBMITTED IN WRITING TO CRYSTAL.G.HUSTEAD@WV.GOV PRIOR TO THE QUESTION PERIOD DEADLINE CONTAINED IN THE INSTRUCTIONS TO VENDORS SUBMITTING BIDS

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES		HEALTH AND HUMAN RESOURCES	
OFFICE OF INSPECTOR GENERAL		OFFICE OF INSPECTOR GENERAL	
1900 KANAWHA BLVD E, BLDG 6 RM 817-B		1900 KANAWHA BLVD E, BLDG 6 RM 817-B	
CHARLESTON	WV	CHARLESTON	WV
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Enterprise system management software		.		

Comm Code	Manufacturer	Specification	Model #
43232304			

Extended Description:
Phase 1 - pre-operational

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES		HEALTH AND HUMAN RESOURCES	
OFFICE OF INSPECTOR GENERAL		OFFICE OF INSPECTOR GENERAL	
1900 KANAWHA BLVD E, BLDG 6 RM 817-B		1900 KANAWHA BLVD E, BLDG 6 RM 817-B	
CHARLESTON	WV	CHARLESTON	WV
US		US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Computer software licensing service				

Comm Code	Manufacturer	Specification	Model #
81112501			

Extended Description:
Software Licensing Fees

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
OFFICE OF INSPECTOR GENERAL	OFFICE OF INSPECTOR GENERAL
1900 KANAWHA BLVD E, BLDG 6 RM 817-B	1900 KANAWHA BLVD E, BLDG 6 RM 817-B
CHARLESTON WV	CHARLESTON WV
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Database management system software maintenance				

Comm Code	Manufacturer	Specification	Model #
81112205			

Extended Description:
Modifications and Enhancements, Support

SCHEDULE OF EVENTS

Line	Event	Event Date
1	VENDOR QUESTION DEADLINE	2021-08-03

SOLICITATION NUMBER: CRFQ HHR2200000001
Addendum Number: 1

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

Applicable Addendum Category:

[　] Modify bid opening date and time

[　] Modify specifications of product or service being sought

[✓] Attachment of vendor questions and responses

[　] Attachment of pre-bid sign-in sheet

[　] Correction of error

[　] Other

Description of Modification to Solicitation:

1. To provide answers to vendor questions

No other changes

Bid opening remains August 19, 2021 at 1:30 PM ET

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

Question #1: Whether companies from Outside USA can apply for this (like, from India or Canada)?

Answer #1: Yes

Question #2: Whether we need to come over there for meetings?

Answer #2: No

Question #3: Can we perform the tasks (related to RFP outside USA (like, from India or Canada)?

Answer #3: Yes

Question #4: Can we submit the proposals via email?

Answer #4: Read section 6 Bid Submission on the Instructions to Vendors Submitting Bids for appropriate methods on submitting a response.

Question #5: How many licenses are in this proposal so we can make an accurate bid?

Answer #5: This will vary as we are a new unit. Minimum is 10 and anticipated maximum is 50.

Question #6: Are you looking for soley a whole contact amount or a per unit amount?

Answer #6: Prefer pricing that is scalable for growth.

Question #7: What Solution is currently being used? Also, is the contact amount listed the one that is currently being used?

Answer #7: This is a new system for the Foster Care Ombudsman Unit.

Question #8: How many user licenses will be needed for this deployment?

Answer #8: The minimum number of users is 10 and the anticipated maximum is 50.

Question #9: Will there be phased-in user growth beyond the initial implementation?

Answer #9: This system must be scalable for growth.

Question #10: Can you please provide the budget detail?

Answer #10: The State of West Virginia does not disclose budget information.

Question #11: Can you please provide the number of users?

Answer #11: The minimum number of users is 10 and the anticipated maximum is 50. This system must be scalable for growth.

Question #12: Can you please provide the previous awarded incumbent, if any?

Answer #12: The Foster Care Ombudsman unit does not currently utilize an incumbent case management system.

Question #13: Does the department use Outlook or Gmail for email?

Answer #13: Gmail within Google Workspace

Question #14: Does the department use Microsoft Office or Google Docs for documents?

Answer #14: Google Docs within Google Workspace

Question #15: Does the department have a current database and if so will that data need to be converted into the new system?

Answer #15: Data is maintained presently in Excel and the Foster Care Ombudsman desires that the information captured in Excel be integrated to the new case management system.

Question #16: Although we are browser based and a COTS case management software package we do not provide the hosting service directly. Our software is browser based and can be installed on premise in your data center or in the Cloud with a third party hosting vendor such as Azure, AWS, Rackspace, etc. selected and controlled 100% by your IT department. Is this an acceptable deployment of our case management solution for your RFP or are you looking to the vendor to host the environment?

Answer #16: The Foster Care Ombudsman is looking for a vendor to host the environment.

Question #17: Do you currently use a web form to capture the intake data and if so can you share the fields that are captured?

Answer #17: The Foster Care Ombudsman does not use a webform but desires to add this feature.

Question #18: How many users will need access to the system?

Answer #18: The minimum number of users is 10 and the anticipated maximum number is 50. This system must be scalable for growth.

Question #19: What does DHHR currently use for their case management system?

Answer #19: None, data collection is handled by the Foster Care Ombudsman in Excel.

Question #20: Currently, how many users are on the existing case management system?

Answer #20: The Foster Care Ombudsman currently has seven staff members, but staffing levels are growing.

Question #21: What is the average number of cases that are handled by DHHR within a month/quarter?

Answer #21: The Foster Care Ombudsman is a new office, and any average presently is of limited value, but the current open cases count is approximately 85.

Question #22: Does DHHR have seasonal spikes or increases in case volumes? If so, please provide the average number of cases during those spikes.

Answer #22: The Foster Care Ombudsman is a new office and seasonal and other variations to case volumes are not yet known.

Question #23: Does the agency provide its citizens/constituents with a contact or call center?

Answer #23: Complainants can contact the Foster Care Ombudsman office presently by email, telephone, fax, scheduled appointment, and postal mail. A call center approach will be evaluated based on contact volumes and optimum distribution of workloads.

Question #24: What are the Agency's security protocol and procedures? Please provide a reference document and/or link.

Answer #24: The Foster Care Ombudsman is positioned within the WV DHHR Office of Inspector General. Access to premises, messages, documents, staff, and data are strictly controlled.

Question #25: Will WV citizens have the ability to upload photo image, audio and video files to DHHR?

Answer #25: The Foster Care Ombudsman would envision this available to complainants. Presently information is provided to the Foster Care Ombudsman by telephone, email, fax, by scheduled appointment, and postal mail.

Question #26: The requirement for the case processor is acknowledged. However, would DHHR also desire for proactive notifications (SMS, Email, Agentless voice) to be sent to citizens/constituents/claimants as their case enters or finishes status (e.g., receive complaint, preliminary data collection, investigation in process, awaiting approval to close, etc.). This can assist in the reduction of inbound calls/digital inquiries about case status.

Answer #26: Yes, the Foster Care Ombudsman would examine solutions to provide limited outbound case progress/status information to complainants.

Question #27: Approximately how many emails are processed within a month?

Answer #27: This information is not presently available.

Question #28: Can the department provide examples of the templates used for form letters, fill in form letters, customized form letters or custom letters?

Answer #28: This information is not presently available given the new status of the Foster Care Ombudsman unit.

Question #29: What does the department currently utilize to capture the cost per activity unit to all activities within the workflow? E.g., Business intelligence tool

Answer #29: The Foster Care Ombudsman currently does not engage a tool to capture cost per activity.

Question #30: Does the department currently own an SMS number? If so, how many?

Answer #30: The Foster Care Ombudsman does not currently own an SMS number.

Question #31: If not, does the department require a short or long code SMS number?

Answer #31: That is to be determined.

Question #32: Please define "predictive texts."

Answer #32: Predictive text is the text that is provided by the technology in an anticipatory fashion, which may be accepted or rejected by the user. It is designed to reduce common keystrokes when producing narrative text within a document or field.

Question #33: Is the department looking for a Workforce Management solution? This can assist with the scheduling of agents throughout the year and associated federal holidays.

Answer #33: The Foster Care Ombudsman would have interest in workforce management solutions.

Question #34: Can the department provide a list of the workflow processes that support the existing business practices to the department?

Answer #34: This information is not presently available given the new status of the Foster Care Ombudsman.

Question #35: What are some examples of "standard reports and graphics" that the department is requesting?

Answer #35: The Foster Care Ombudsman is required to establish and maintain a statewide uniform reporting system to collect and analyze data relating to complaints for the purpose of identifying and resolving significant problems, which includes but is not limited to sorting, filtering, analyzing, and presenting complaints data/information qualitatively and quantitatively by type, location, findings, recommendations, observations, agencies, roles, and various other complaint attributes.

Question #36: What type of Single Sign On (SSO) does the department currently use?

Answer #36: We are withdrawing the requirement for Single Sign On (specification **4.1.1.82**).

Question #37: If one is not currently in use, has the department selected an application at this time or does the department want the responding vendor to provide the SSO application?

Answer #37: We are withdrawing the requirement for Single Sign On (specification **4.1.1.82**).

Question #38: The following link does not work: https://www.state.wv.us/admi%20n/purchase/privacy/defautl.html "404 - File or directory not found. The resource you are looking for might have been removed, had its name changed, or is temporarily unavailable."

Answer #38: http://www.state.wv.us/admin/purchase/privacy/default.html

Question #39: Can you please provide an estimated budget for the 1-year Contract (Implementation + Support)?

Answer #39: The State of West Virginia does not provide budget information.

Question #40: Can you please provide the total users of this system (internal and external split) and expected minimum users per month?

Answer #40: The minimum number of users is 10 and the anticipated maximum is 50. This system must be scalable for growth.

Question #41: RFP Section 3.1 (pg 26) - "Vendor must have completed a minimum of five systems for other states." Can you please clarify if Agency will consider the multi-system experience in a single state against the count (of five)?

Answer #41: If the vendor has sold systems to two or more agencies in a State each of those systems could be counted as a completed system. If, on the other hand, the vendor has sold a single system to two or more agencies with similar needs who are sharing the expense it is still a single system and would count as only one of the required five.

Question #42: RFP Section 3.4 (pg 26) refers to "Vendor must provide contact information including contact name, phone number and email address of a director of a state Foster Care Ombudsman program where they have successfully installed and supported an Enterprise level, Cloud-based statewide case management system." Is Vendor expected to have installed & supported the Case management system in the Foster Care Ombudsman program? Or any Case Management experience in Health & Human Services suffices?

Answer #42: We are seeking to work with a vendor who has provided a case management system to an ombudsman program, or a program devoted to independent and impartial investigation of concerns and complaints. Foster Care Ombudsman programs have varying titles in other states, i.e., Child Advocate, Foster Child Ombudsman, Resource Parent Ombudsman, Foster Parent Ombudsman, etc.

Question #43: RFP Section 4.1.1.1 (pg 26) Can you please confirm the warranty period?

Answer #43: Section **4.1.1.1** as referenced in this question refers to how soon meetings will occur with staff. There is no reference to warranty.

Question #44: Attachment A. During Operation Phase, Can you please confirm if the SaaS license and Vendor Technical support costs be given separately?

Answer #44: We have Commodity Lines for the project, Software Licensing Fees, and Modifications and Enhancements/Support.

Question #45: RFP Section 5 Contract award and Page #42: Is there a cost sheet format for us to submit?

Answer #45: We have Commodity Lines in WVOasis for the project, Software Licensing Fees, and Modifications and Enhancements/Support. Pricing should be included on the Commodity Lines.

Question #46: Bid Submission - Page #5. Is there any Technical response format and any pages limit for response document?

Answer #46: No, the Request for Quotation procurement method does not require a technical response, the contract award is based on lowest bid meeting specifications.

Question #47: How many users do you anticipate initially?

Answer #47: A minimum of 10 and an anticipated maximum of 50. The system must be scalable for growth, as the Foster Care Ombudsman unit is new in state government.

Question #48: What is the expected or average number of complaints and cases per year?

Answer #48: This is a new program, and the volume is very difficult to predict but is anticipated over 1,000 complaints annually at minimum with potential to grow fivefold or greater.

Question #49: How many documents/photo/audio/video files do you estimate will need to be captured? It would be helpful for estimates per case, per month, per year, and if known the sizes including total volume (GB or TB).

Answer #49: This is a new program, and it is not possible to estimate at this time.

Question #50: Does the reference to live chat on the public portal anticipate a service staffed by Ombudsman staff or are you seeking automation such as a chatbot?

Answer #50: The program would anticipate using both staff and chatbot technology.

Question #51: What is the source of user identity that is preferred for single sign on? For example, do all users who will need to authenticate have Google accounts or Active Director Accounts or similar?

Answer #51: We are withdrawing the requirement for Single Sign On (specification **4.1.1.82**).

Question #52: Is offline capture and sync a desired feature?

Answer #52: Yes.

Question #53: Has the Agency recently performed any business process reengineering (BPR) initiatives related to its foster care processes? Or will that take place as part of the system design and implementation?

Answer #53: Business processes and workflows will be a part of system design, configuration, and implementation.

Question #54: When is the proposed start date for this project? Is there a preferred date to have the system live? How long does the Agency expect this project to last?

Answer #54: The award date is dependent on when the agency completes their evaluation of all bids received.

Question #55: Does the state have any preferred or existing cloud provider(s)?

Answer #55: No. The State requires that the system be hosted in a Tier 3 or Tier 4 data center with privacy and security provisions in place that are at least as strict as HIPAA and NIST SP 800-53, Rev. 5.

Question #56: Please provide any specific security requirements for the hosting environment.

Answer #56: The State requires that the system be hosted in a Tier 3 or Tier 4 data center with privacy and security provisions in place that are at least as strict as HIPAA and NIST SP 800-53, Rev. 5.

Question #57: Please provide any specific analytic functionality requirements for this system.

Answer #57: Capability for systematic computational analysis of complaints, contacts, and cases data and statistics is required.

Question #58: Please provide any specific data visualization functionality requirements for this system.

Answer #58: Visual representations of data and reports to include graphs, charts, and dashboards is required.

Question #59: Is there any existing data that needs to be migrated to the new system?

Answer #59: Yes, from Excel and Google Sheets.

Question #60: Are there any data retention requirements for the vendor to keep the data for certain amount of time after the program is retired? If so, how long should the data be retained?

Answer #60: All of the data in the system is and remains the property of WV DHHR and must be provided to the Office of the Foster Care Ombudsman upon termination of the contract, termination of the program, or upon request of WV DHHR at any time during the life of the contract. Data shall be made available in a SQL format or other agreed upon database format and transfer of the data shall be via Secure File Transfer Protocol or other mutually agreed upon secure transfer method.

Question #61: Is there any post support training desired?

Answer #61: Yes, as it relates to new or changing features or functionalities of the system, or as it relates to identified user needs with the existing system.

Question #62: Please elaborate on the system integration requirements. How many existing systems will the new case management system have to integrate with?

Answer #62: None.

Question #63: What is the internal user count of people within WVDHHR who would need direct access to the system?

Answer #63: A minimum of 10 and an anticipated maximum of 50. The system must be scalable for growth, as the Foster Care Ombudsman unit is new in state government.

Question #64: Are there external users you anticipate accessing the system throughout the year? If so, what does that user count look like?

Answer #64: This is a new program and use by external users is difficult to estimate at this time.

Question #65: Is it possible for an extension on the due date of this RFQ?

Answer #65: Bids are due by August 19 at 1:30 PM ET, this date will remain as is

Question #66: Is the vendor able to provide a reference for a similar use case or other Foster Care opportunities they have successfully implemented? Is there an exception to this?

Answer #66: The reference must be for a use case or other foster care opportunities performing the same core functions as a foster care ombudsman program.

Question #67: Will the public facing portal allow direct eternal access for the purpose of securely filing complaints or checking on the status of existing complaints?

Answer #67: Yes.

Question #68: Will it be acceptable to discuss remedies during contract negotiations?

Answer #68: There are no contract negotiations for a Request for Quotation, award is based on lowest bid meeting all mandatory requirements.

Question #69: Does WV DHHR have to meet certain regulatory requirements like FedRAMP?

Answer #69: The State requires that the system be hosted in a Tier 3 or Tier 4 data center with privacy and security provisions in place that are at least as strict as HIPAA and NIST SP 800-53, Rev. 5.

Question #70: We have a Named User licensing structure. We define Named Users as "staff with access to the back-office Software regardless of whether such access is concurrent or consecutive." Based on this definition, how many Named Users does the agency anticipate having on its new system?

Answer #70: A minimum of 10 and an anticipated maximum of 50. The system must be scalable for growth, as the Foster Care Ombudsman unit is new in state government.

Question #71: What is the budget for this project? If all cost proposals come in above a certain amount, would this RFP be cancelled? What is that amount? Did the legislature allocate any funds specifically for this project? If so, what is the amount allocated, and when does it need to be used?

Answer #71: The State of West Virginia does not release budget information.

Question #72: Can the State provide a non-scanned version of the RFP to assist vendors in duplicating the requirements for their response?

Answer #72: A non-scanned version of the solicitation will not be provided. The solicitation is a Request for Quotation, not a Request for Proposal. The contract award will be based on lowest bid meeting all mandatory requirements.

Question #73: Requirement 4.1.2.15: For non-critical issues, we utilize a ticket management system that utilizes a web portal to submit issues. Our typical process includes the review, correction and testing of issues over the course of several days, including a client review stage. As a result, we typically respond to issues within the first 24 hours of a ticket being submitted. Would this method of support be sufficient to meet the requirements of the RFP, or would support methods be expected to conform to the State's requirements?

Answer #73: Support methods would be expected to conform to the State's requirements.

Question #74: Requirement 4.1.2.16 discusses client user technical support: is this intended to support clients of the State?

Answer #74: Support methods would be expected to conform to the State's requirements.

Question #75: There is no apparent requirement for a technical proposal or statement of work required with the Request for Quotation. Should the vendor simply redline the RFQ with suggested exceptions and attach that to the quote in the WVoasis system?

Answer #75: A vendor must meet all mandatory requirements of the Request for Quotation. By signing and submitting the bid, or by submitting it electronically through WVOasis, a vendor is confirming that they meet all mandatory requirements. Request for Quotations are awarded to the vendor that provides the lowest bid that meets all mandatory specifications, technical proposals are not required for this type of procurement method.

Question #76: Please identify all required attachments to the quote. For example, is a certificate of insurance required with the submission of the vendor's quote? What other forms/submissions are expected/required for submission with the quote?

Answer #76: All required documents to be submitted with the bid are listed within the Request for Quotation.

Question #77: Please provide budget information for this project. According to the State of West Virginia Supplemental Budget Requests for FY2021 (found at https://www.wvlegislature.gove/legisdocs/reports/budget/Supplemental_Appropriation_Re quests_FY21.pdf), "[a] computerized case tracking system must also be purchased (initial cost is $75,000 and ongoing cost of $55,000 for user license fees, hosting services and system maintenance and support)." Is this the budget for this project? If not, please provide accurate figures. Does the State anticipate the use of federal matching funds to enhance these amounts?

Answer #77: The State of West Virginia does not release budget information.

Question #78: Several of the requirements describe a "public-facing portal." Can the State please provide more details as to the envisioned purpose of this portal (specific use case) and how the State envisions that integrate with the desired case management system?

Answer #78: The state/program anticipates a website that is equipped with a user-friendly webform to which citizens can enter complaints or comments. The information keyed to the webform should flow directly into the case management system to alleviate redundant keying of data by program staff.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: HHR2200000001

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.

PlanStreet Inc.
_____
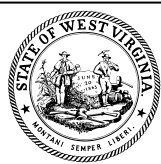Company

A Rao
_____
Authorized Signature

08/19/21
_____
Date

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

	Department of Administration	**State of West Virginia**
(seal)	**Purchasing Division** **2019 Washington Street East** **Post Office Box 50130** **Charleston, WV 25305-0130**	**Centralized Request for Quote** **Info Technology**

Proc Folder:	909208	**Reason for Modification:**
Doc Description:	STATEWIDE CASE MANAGEMENT SYSTEM	
Proc Type:	Central Master Agreement	

Date Issued	**Solicitation Closes**	**Solicitation No**	**Version**
2021-07-27	2021-08-19 13:30	CRFQ 0511 HHR2200000001	1

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON   WV   25305

US

VENDOR

Vendor Customer Code: **VS0000038555**

Vendor Name :   **PlanStreet Inc.**

Address :   **220 Lexington Green Circle**

Street :   **Ste 110**

City :   **Lexington**

State :   **Kentucky**   **Country :**   **USA**   **Zip :**   **40503**

Principal Contact :   **Aon Rana**

Vendor Contact Phone: **800-859-5407**   **Extension:**

FOR INFORMATION CONTACT THE BUYER
Crystal G Hustead

(304) 558-2402

crystal.g.hustead@wv.gov

Vendor
Signature X _(signature)_   **FEIN#**   82-3019324   **DATE**   08/19/21

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

ADDITIONAL INFORMATION

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR AN ENTERPRISE LEVEL, CLOUD-BASED, STATEWIDE CASE MANAGEMENT SYSTEM PER THE ATTACHED DOCUMENTS.

QUESTIONS REGARDING THE SOLICITATION MUST BE SUBMITTED IN WRITING TO CRYSTAL.G.HUSTEAD@WV.GOV PRIOR TO THE QUESTION PERIOD DEADLINE CONTAINED IN THE INSTRUCTIONS TO VENDORS SUBMITTING BIDS

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
OFFICE OF INSPECTOR GENERAL	OFFICE OF INSPECTOR GENERAL
1900 KANAWHA BLVD E, BLDG 6 RM 817-B	1900 KANAWHA BLVD E, BLDG 6 RM 817-B
CHARLESTON WV	CHARLESTON WV
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Enterprise system management software				

Comm Code	Manufacturer	Specification	Model #
43232304			

Extended Description:
Phase 1 - pre-operational

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES	HEALTH AND HUMAN RESOURCES
OFFICE OF INSPECTOR GENERAL	OFFICE OF INSPECTOR GENERAL
1900 KANAWHA BLVD E, BLDG 6 RM 817-B	1900 KANAWHA BLVD E, BLDG 6 RM 817-B
CHARLESTON WV	CHARLESTON WV
US	US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Computer software licensing service				

Comm Code	Manufacturer	Specification	Model #
81112501			

Extended Description:
Software Licensing Fees

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES			HEALTH AND HUMAN RESOURCES		
OFFICE OF INSPECTOR GENERAL			OFFICE OF INSPECTOR GENERAL		
1900 KANAWHA BLVD E, BLDG 6 RM 817-B			1900 KANAWHA BLVD E, BLDG 6 RM 817-B		
CHARLESTON	WV		CHARLESTON	WV	
US			US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Database management system software maintenance				

Comm Code	Manufacturer	Specification	Model #
81112205			

Extended Description:
Modifications and Enhancements, Support

SCHEDULE OF EVENTS

Line	Event	Event Date
1	VENDOR QUESTION DEADLINE	2021-08-03

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions