Welcome, Robert M Ross

Solicitation Response(SR) Dept: 0511 ID: ESR01122200000004190 Ver.: 1 Function: New Phase: Final ▾ | Modified by batch , 01/13/2022

Header 📎 5   [List View]

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

Procurement Folder: 964749

Procurement Type: Central Master Agreement

Vendor ID: 000000184365

Legal Name: THOMSON REUTERS WEST

Alias/DBA: WEST PUBLISHING CORPORATION

Total Bid: $251,450.00

Response Date: 01/13/2022

Response Time: 13:18

Responded By User ID: westpub2

First Name: John S.

Last Name: Nelson

Email: westlaw.bids@thomsonr

Phone: 800-328-4880

SO Doc Code: CRFQ

SO Dept: 0511

SO Doc ID: OIG2200000001

Published Date: 12/14/21

Close Date: 1/13/22

Close Time: 13:30

Status: Closed

Solicitation Description: STATEWIDE CASE MANAGEMENT SYSTEM

Total of Header Attachments: 5

Total of All Attachments: 5

Proc Folder:	964749
Solicitation Description:	STATEWIDE CASE MANAGEMENT SYSTEM
Proc Type:	Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2022-01-13 13:30	SR 0511 ESR01122200000004190	1

VENDOR
000000184365
THOMSON REUTERS WEST

Solicitation Number:	CRFQ 0511 OIG2200000001				
Total Bid:	251450	**Response Date:**	2022-01-13	**Response Time:**	13:18:15
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	Data base management system software				53000.00

Comm Code	Manufacturer	Specification	Model #
43232304			

Commodity Line Comments:

Extended Description:

case management system

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Computer software licensing service				198450.00

Comm Code	Manufacturer	Specification	Model #
81112501			

Commodity Line Comments: Option Years 2 through 4 include a 3% increase year over year.

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	100.00000	HOUR	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112205			

Commodity Line Comments: Included in Deliverable 2 pricing.

Extended Description:

The quantity of 100 is an estimate for bidding purposes only. Actual hours could be more or less.
Modifications and Enhancements, Support

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: OIG2200000001

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

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

Addendum Numbers Received:
(Check the box next to each addendum received)

[x] Addendum No. 1   [   ] Addendum No. 6

[   ] 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.

West Publishing Corporation
_____
Company

_____
Authorized Signature

1/13/2022
_____
Date

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

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: OIG2200000001

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[ ] Addendum No. 3	[ ] Addendum No. 8
[ ] Addendum No. 4	[ ] Addendum No. 9
[ ] Addendum No. 5	[ ] Addendum No. 10

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West Publishing Corporation
Company

Sharie A. Kirsch
Authorized Signature

1/13/2022
Date

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

ACORD®

CERTIFICATE OF LIABILITY INSURANCE
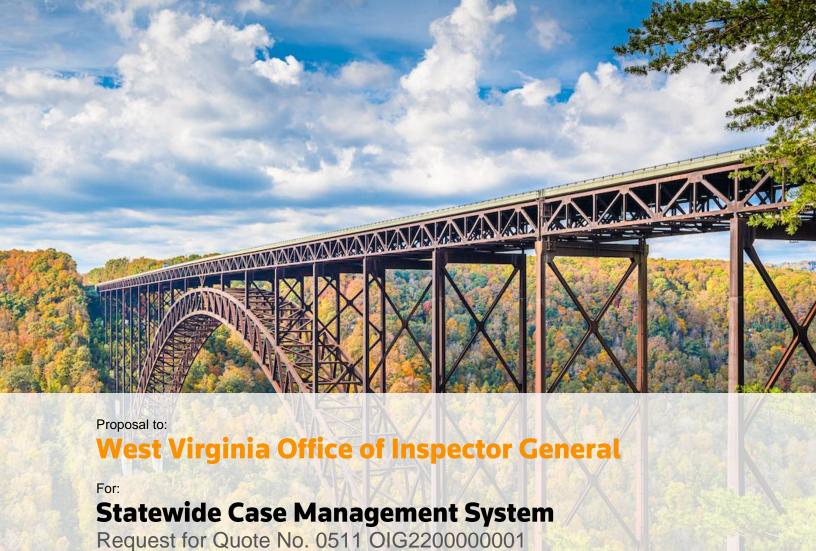
DATE (MM/DD/YYYY)
10/01/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:		
Marsh USA, Inc. 1166 Avenue of the Americas New York, NY 10036 Attn: NewYork.Certs@marsh.com Fax: 212-345-3695	PHONE (A/C, No, Ext):		FAX (A/C, No):
	E-MAIL ADDRESS:		
	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A : ACE American Insurance Company		22667
INSURED Thomson Reuters Corporation 3 Times Square New York, NY 10036	INSURER B : ACE Property and Casualty Insurance Company		20699
	INSURER C : Indemnity Insurance Company of North America		43575
	INSURER D : ACE Fire Underwriters Insurance Company		20702
	INSURER E :		
	INSURER F :		

COVERAGES

CERTIFICATE NUMBER: NYC-011204563-01   REVISION NUMBER: 0

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY			HDO G72483844	10/01/2021	10/01/2022	EACH OCCURRENCE	$ 2,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 500,000
							MED EXP (Any one person)	$ 25,000
							PERSONAL & ADV INJURY	$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 4,000,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ 2,000,000
	OTHER:							$
A	AUTOMOBILE LIABILITY			ISA H25541881	10/01/2021	10/01/2022	COMBINED SINGLE LIMIT (Ea accident)	$ 3,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
B	X UMBRELLA LIAB X OCCUR			G27963675 006	10/01/2021	10/01/2022	EACH OCCURRENCE	$ 5,000,000
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$ 5,000,000
	DED RETENTION $							$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			WLR C68921946 (AOS)	10/01/2021	10/01/2022	X PER STATUTE OTH-ER	
D	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N N	N/A		SCF C68922021 (WI)	10/01/2021	10/01/2022	E.L. EACH ACCIDENT	$ 1,000,000
A	(Mandatory in NH)			WLR C68921983 (AZ, CA, MA)	10/01/2021	10/01/2022	E.L. DISEASE - EA EMPLOYEE	$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - POLICY LIMIT	$ 1,000,000
A	Professional Liability (E&O)			G21635029 019 (SIR: $10,000,000)	10/01/2021	10/01/2022	Limit:	40,000,000
A	Cyber			G21635029 019 (SIR: $10,000,000)	10/01/2021	10/01/2022	Limit:	40,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER	CANCELLATION
Thomson Reuters Corporati 3 Times Square New York, NY 10036	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE *Marsh USA Inc.*

ACORD 25 (2016/03)   The ACORD name and logo are registered marks of ACORD

Proposal to:

West Virginia Office of Inspector General

For:

Statewide Case Management System

Request for Quote No. 0511 OIG2200000001

Submitted: January 13, 2022

THOMSON REUTERS®

Submitted to:

West Virginia Department of Administration, Purchasing Division
Attention: Crystal G. Hustead
(304) 558-2402
Crystal.g.hustead@wv.gov

Submitted By:

Sharie Kirsch, Director of Business Development
Thomson Reuters
sharie.kirsch@thomsonreuters.com
(703) 628-8703

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1.0 QUALIFICATIONS

Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications and proof be submitted prior to contract award:

3.1. Vendor must have completed a minimum of five systems for other states.

Our investigative case management and tracking solution (CaseTracker™) is fully implemented in 14 social service and healthcare programs, including Medicaid, Managed Care, Supplemental Nutritional Assistance Program (SNAP), Unemployment Insurance (UI), and Tax. CaseTracker is used by the largest state Medicaid and UI program in the Country.

In addition, six (6) more clients are in the process of implementing CaseTracker.

3.2. Vendor must provide a statewide case management, customer relationship management, or investigations management system to a minimum of three state agencies.

CaseTracker is currently used by 10 state agencies, including:

- Alabama Medicaid Agency
- California Department of Health Care Services
- California Employment Development Department
- District of Columbia Department of Human Services
- Illinois Department of Employment Security
- Indiana Family Social Services Administration
- Iowa Workforce Development
- Nevada Health and Human Services
- Nevada Department of Employment, Training, and Rehabilitation
- South Carolina Division of Family Assistance
- Tennessee

In addition, six (6) more state agencies are in the process of implementing CaseTracker. These agencies include:

- Colorado Department of Labor and Employment
- District of Columbia Department of Unemployment Services
- Hawaii Department of Human Services
- Kansas Department of Labor
- Kentucky Office of Unemployment Insurance

3.3. Vendor must demonstrate relationship and support to organizations at the state and/or federal level by providing three references by current client(s) or completed projects within the last five years. References should be provided with bid responses, will be required upon request.

REFERENCE #1 – CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES

Project Title	Medi-Cal Program Integrity Data Analytics	
Project Duration	Start: September 2013	End: Ongoing
Customer Name	California Department of Health Care Services (DHCS)	
Customer Contact Information	Name: Karen Johnson	
	Title: Chief Deputy Executive Director for Covered California	

	(former Chief Deputy Director of California DHCS) Phone: (916) 228-8444 Email: Karen.johnson@covered.ca.gov
Services Delivered	September of 2013, TR, as a subcontractor, was awarded the Behavioral Health Data Analytics project with California Department of Healthcare Services (DHCS) to detect and help prevent FWA within California's Drug Medicaid (known as Medi-Cal) program. Since then, the project has expanded and FraudCaster is currently deployed in DHCS' Medicaid Program Integrity Data Analytics (MPIDA) program. This project has over 14M covered lives and 250,000 providers and is focused on FWA detection in the Medicaid program. The main goal of the MPIDA project is to enhance DHCS program integrity monitoring capability through the use of an enterprise-wide predictive analytics solution. This project provides sophisticated data processing tools that can integrate multiple flows of data from within and external to DHCS, with the capability to aggregate and analyze that data to produce meaningful predictions about Medi-Cal healthcare providers with suspect billed and paid claims data, and their associates. The ultimate outcome of this project is stop erroneous payments early, avoid enrolling unscrupulous providers, and assist in shaping DHCS program policy and claim system edits for the California Medicaid Management Information System (MIS) and Short-Doyle Medi-Cal (SD/MC) system when program integrity vulnerabilities have been identified. TR configured the FraudCaster dashboard for DHCS to display behavioral analytics, predictive models, alerts, Geospatial Analysis, Link Analysis, Social Network Analysis, and Provider and Beneficiary Profiles. TR integrates third-party consumer and business data to detect issues with identity, eligibility status (such as age, out-of-state indicators, and incarceration status), and potential fictitious businesses (such as shell company activity, credit experience, and criminal histories). FraudCaster also includes dozens of flags for program specific behaviors such as collusive networks, billing spikes, drug diversion, doctor shopping, and other potential issues. To date, this project has identified $579 million of DHCS-accepted leads spanning eligibility, improper payments, and individual and collusive provider fraud. Since the full analytics work began with DHCS in 2017, FraudCaster has produced the following results: • $622,917,069 in FWA DHCS accepted Dollars at Risk • $$275,849,053 in pending recoveries • $45,816,586 in collected recoveries • 101 unique FWA schemes identified

REFERENCE #2 – ALABAMA MEDICAID AGENCY

Project Title	Investigative Case Management	
Project Duration	Start: March 2020	End: Ongoing
Customer Name	Alabama Medicaid Agency	
Customer Contact Information	Name: Beverly Churchwell Title: Director for Program Integrity Division Phone: (334) 242-5318	

	Email: Beverly.churchwell@medicaid.alabama.gov
Services Delivered	In March 2020, TR implemented CaseTracker for the Alabama Medicaid Agency. They use the solution to investigative cases of FWA in Alabama's Medicaid program.

REFERENCE #3 – TENNESSEE OFFICE OF INSPECTOR GENERAL

Project Title	Investigative Case Management and Fraud and Abuse Detection and Prevention	
Project Duration	Start: August 2020	End: Ongoing
Customer Name	Tennessee Office of the Inspector General (OIG)	
Customer Contact Information	Name: Frank Houle Title: Director of Program Integrity Phone: (615) 487-6057 Email: frank.houle@tn.gov	
Services Delivered	To identify potential fraud and abuse in Tennessee's SNAP program, the OIG implemented TR's FraudCaster and CaseTracker platform in April of this year. The OIG leverages the platform to identify potential cases of intentional household error, recipient trafficking, bad actor networks and more, and then uses the integrated case management platform for investigations management and reporting.	

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2.0 MANDATORY REQUIREMENTS

In the table that follows we have noted which requirements are met by our proposed solution.

☑ **Included**   ☒ **Not Included**

No.	Requirement Description	Requirement Met
4.1	**Mandatory Contract Services Requirements and Deliverables**	
4.1.1	**General System Requirements**	
4.1.1.1	System must be delivered and operational within 180 days of a contract award in a Software-as-a-Service (SaaS) model, available 24/7 with an internet connection.	☑
4.1.1.2	System must be modular to allow system upgrades and enhancements.	☑
4.1.1.3	System must be scalable to accommodate unlimited persons, cases, contacts, activity transactions, and reports.	☑
4.1.1.4	System must allow full control of administrative tables without vendor assistance including but not limited to demographic fields, response types, and validation rules, designation, configuration, and characteristics of custom fields, designation of mandatory and optional fields, contact types and categories, note and document types and categories, places including counties, municipalities, towns, and zip codes, telephone types, definitions and content of picklists and user options within fields, categories and classifications, key performance indicators including targets, thresholds, and alerts, and file management and data retention.	☑
4.1.1.5	System must provide administrator(s) the ability to create messages that are targeted to specific users, user groups, or all users and incorporates a positive notification via an email or a visual cue displayed on the users login screen or home page.	☑
4.1.1.6	System must provide administrative tools allowing authorized users to configure screens, arrange fields, show and hide fields, configure dropdown and picklists, define default and autofill values, and manage role-based security permissions without vendor/technical assistance.	☑
4.1.1.7	System must enable real time collaboration or access sharing with users.	☑
4.1.1.8	System must enable access on multiple device types (tablet, mobile phone, desktop computer, laptop) and allow for speech-to-text functionality where applicable.	☑
4.1.1.9	System must make use of ease-of-use, intuitive interface elements such as pop-up calendars, widgets, and ergonomic features including minimal clicks and maximization of screen space to avoid scrolling.	☑
4.1.1.10	System must maximize capabilities to reduce redundant data entry and keystrokes.	☑
4.1.1.11	System must be configurable to meet the requirements of the client	☑
4.1.1.12	System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task, and case status monitoring by case, user, team, and enterprise.	☑

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4.1.1.13	System must provide access to all applications and appropriate user documentation, vendor use, and help tools within a single site.	☑
4.1.1.14	System must integrate seamlessly with back-office systems including current versions of Microsoft Office, Microsoft Outlook and Google applications, including Gmail, Sheets, Docs etc., as well as seamless integration with current software systems.	☑
4.1.1.15	System function must incorporate spell check, cut and paste, and other routine word processor functions throughout narrative fields.	☑
4.1.1.16	System must allow users to return to recently accessed records or activities.	☑
4.1.1.17	System must provide for multiple addresses lines for notation as needed.	☑
4.1.1.18	System must allow entry of foreign characters.	☑
4.1.1.19	System must support the full case management lifecycle from initial contact to case closure.	☑
4.1.1.20	System must provide a way to navigate a case summary view	☑
4.1.1.21	System must support case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among and between users.	☑
4.1.1.22	System must allow agency to attach an actual or estimated cost per activity unit to all activities within the workflow to enable estimates of the activity cost of providing complete handling and investigatory services.	☑
4.1.1.23	System must provide a history function allowing for a complete contact history and tracking tools for all phone calls, emails, postal mail entries, faxes, text messages, social media messages or other permitted or manually entered contacts to the system or case.	☑
4.1.1.24	System must enable administrative development of data field labels, data field characteristics, data field picklists.	☑
4.1.1.25	System must permit designation of holidays for business day versus calendar day calculations.	☑
4.1.1.26	System must support user-defined workflow rules.	☑
4.1.1.27	System must allow for the users to set a specific list of favorites including searches, templates, and contacts.	☑
4.1.1.28	System must allow administrator to add, control and update user role-based security permissions by user or user group types.	
4.1.1.29	System must provide for single sign on authentication.	☑
4.1.1.30	Vendor must make available and implement upgrades, enhancement, and error corrections at no additional charge when such upgrades, enhancement, and error corrections are generally made available to its other clients at no additional charge.	☑
4.1.1.31	Application and Data must be backed up to a second secure data center that is 100 air miles from the primary site to make it highly unlikely that both data centers would be compromised from a single disaster whether natural or manmade.	☑

4.1.1.32	For any system failure, the application must be restored at either the primary location or the back-up location within 24 hours.	☑
4.1.2	**Task and Time Management Requirements**	
4.1.2.1	System must support users and administrators to schedule and prompt future date tasks, activities, calls, follow ups, and do so, with appropriate permissions, to other users.	☑
4.1.2.2	System must provide for person and case specific alerts (e.g., pop- up messages, informing emails) as mechanisms to rapidly alert staff about high priority issues (e.g., system is not responding, error message has occurred, person or case requires special handling or approval to access, etc.).	☑
4.1.2.3	System must support correspondence production, including letter and email templates, that can be connected to workflows, can be auto populated with case or person specific data, and can be transmitted and timestamped	☑
4.1.2.4	System must alert users as new tasks and case assignments are made and have the ability to monitor summarized issues or task status, through a real time, user-personalized dashboard.	☑
4.1.2.5	System must support ad hoc workflows and incorporated, automatic generation of related tasks.	☑
4.1.2.6	System must allow user to define items requiring approval and provide alerts for those items.	☑
4.1.2.7	System must include monitoring functionality allowing progress to be monitored and alerts and reminders generated when the workflow nears completion.	☑
4.1.3	**Correspondence Requirements**	
4.1.3.1	System must support templates as form letters, fill in form letters, customized form letters, or custom letters and using integrated HTML editor without Microsoft Word.	☑
4.1.3.2	System must support the capability to create output in hard copy, paper letters, email, and social media/digital messaging.	☑
4.1.3.3	System must support the capability to set default printers for hard copy output.	☑
4.1.3.4	System must support the ability for mass generation of outgoing correspondence.	☑
4.1.4	**External Document and File Handling Requirements**	
4.1.4.1	System must support documentation stored within a case, in all common formats including Google Sheets, Docs, PDF, Microsoft Word, Excel etc., and must be document-level searchable.	☑
4.1.4.2	System must allow retention of photo images, audio and video files within contact records as needed.	☑
4.1.4.3	System must allow document files to be thumbnail/first page previewed prior to full access. Files that contain images, and/or audio must be opened prior to being viewed and are not accessible via thumbnail or preview.	☑
4.1.5	**Search Requirements**	

4.1.5.1	System must provide simple search capabilities to determine whether a caller, person, or case record already exists to avoid duplication.	☑
4.1.5.2	System must enable users to search picklists using drop down menus and predictive texts.	☑
4.1.5.3	System must provide a quick search capability based on a single field as well as an advance capability incorporating multiple fields and filters.	☑
4.1.5.4	System must allow document attachments to be associated with a record, indexed, and searched by indexed fields.	☑
4.1.5.5	System must allow documents to be scanned into person and case records, indexed, and searched by indexed fields.	☑
4.1.5.6	System must allow complaints or cases to be associated with one another.	☑
4.1.5.7	System must provide resource searching tools to quickly locate records for efficient provision of information and referrals.	☑
4.1.5.8	System data and documents must be searchable to enable statistics and reports.	☑
4.1.6	**Referral Record Requirements**	
4.1.6.1	Name field must include capacity to enter and store nicknames, appellations, and suffixes.	☑
4.1.6.2	System must provide a means to merge identified duplicate records through an automated process or manual process, and a means to undo a merge performed in error.	☑
4.1.6.3	System must manage essential information in a global record including demographics, telephone numbers, email addresses, county, region, map links, contacts, notes, documents, file attachments, and associated persons including but not limited to relatives, children, attorneys, collaterals.	☑
4.1.6.4	System must enable users to identify history of previous complaints involving a caller, person, or case.	☑
4.1.6.5	System must support automated or manual assignment of a unique case identifier upon creation of a new case.	☑
4.1.6.6	System must support user addition of notes, complaints, inquiries, tasks, calls, and other vital data to person and case records in accordance with role-based security permissions that include view, add, edit, and delete levels of access.	☑
4.1.6.7	System must enable data entry and tracking of information required for reporting, including but not limited to referral source, primary program, primary error type, various date fields, age of referral and status of referral.	☑
4.1.7	**Report Requirement**	
4.1.7.1	System must provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditional highlighting for important variances to targets.	☑
4.1.7.2	System must provide capability for dashboard reports to drill down to underlying data.	☑

4.1.7.3	System must provide ability to redact a document as needed prior to printing.	☑
4.1.7.4	System must maintain creation time and dates of records and modifications and enables associated reporting on status of open and past due tasks and cases.	☑
4.1.7.5	System must provide capacity to create and generate both standard and ad hoc reports.	☑
4.1.7.6	System must provide for historical reports to show trends and comparisons between time periods.	☑
4.1.7.7	System must provide for generation and distribution of standard and ad hoc reports at regular intervals as set by users with role-defined permissions.	☑
4.1.7.8	System must provide a library of standard reports supporting common aspects of case management and investigatory practice.	☑
4.1.7.9	System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future like reports.	☑
4.1.7.10	System must provide standard user activity and history reports.	☑
4.1.7.11	System must allow standard and ad hoc reporting capability allowing users to easily query and extract data into viewable, exportable, and printable reports without assistance of the vendor or technical resources.	☑
4.1.7.12	System reporting engine must allow reporting against the full up- to-date transactional database ensuring that all data elements are available for inclusion or selection in reports.	☑
4.1.7.13	System reporting engine must be user-friendly allowing report writers to create, publish, schedule, and distribute standard and ad hoc reports in varying formats including graphs and charts	☑
4.1.8	**User Tracking Requirements**	
4.1.8.1	System must capture and record all case details, e.g., communication records between investigators and interview subjects, copies of inbound and outbound emails, etc.	☑
4.1.8.2	System must maintain a chronological and reportable audit trail of activity by user and case, including a history of modifications to all data and event logs by record and user.	☑
4.1.8.3	System must track user login and logout history.	☑
4.1.8.4	System must support creation of a call record at the time of contact or after the fact.	☑
4.1.9	**Public Facing and/or Web Portal Requirements**	
4.1.9.1	System must enable a public facing web form and a public use email to integrate and populate, as specified by the administrator, to contact, person, or case records to avoid duplication of data entry.	☑
4.1.9.2	System must provide a web-based application interface compatible with recent and current versions of Internet Explorer, Microsoft Edge, Google Chrome, Firefox, Apple Safari.	☑

4.1.9.3	The public facing portal and established weblinks must include designated spaces that support administrator created content and the system must include the content management tools and access necessary to update the content and appearance.	☑
4.1.9.4	System must provide means for administrators to update the look and content of the public facing portal and the content of administrator-created content on associated web links.	☑
4.1.9.5	System must provide a public facing online portal with the option for consumer digital engagement tools (SMS, live chat).	☑
4.1.9.6	System must provide a customizable web form incorporating a challenge response test such as CAPTCHA.	☑
4.1.9.7	System must provide a public facing portal that meets Web Content Accessibility Guidelines (WCAG) version 2.1.	☑
4.1.9.8	System must provide search capabilities to determine whether a caller, person, or case record exists to provide for a means to auto populate a new record if necessary.	☑
4.1.10	**Deliverables and Optional Renewals**	
4.1.10.1	Year 1 Deliverable 1: Vendor will complete the case management system (CMS) and provide IFM with in-person and reproduceable, web based or DVD, training for both State Office staff and end users within the timeframes agreed on by IFM and the vendor when the contract is awarded.	☑
4.1.10.2	Year 1 Deliverable 2: CMS In-service date through the end of contract: Vendor will support CMS use and provide system upgrades and maintenance as required by contract.	☑
4.1.10.3	Year 1 Deliverable 3: CMS In-service date through the end of contract: Technical assistance will be performed as needed upon contact by IFM.	☑
4.1.10.4	Optional Renewal Year 2 Deliverable 1: Throughout contract period: Vendor will support CMS use and provide system upgrades and maintenance as required by contract.	☑ Note: Includes a 3% increase year over year
4.1.10.5	Optional Renewal Year 2 Deliverable 2: Throughout contract period: Technical assistance will be performed as needed upon contact by State or Local staff.	☑
4.1.10.6	Optional Renewal Year 3 Deliverable 1: Throughout contract period: Vendor will support CMS use and provide system upgrades and maintenance as required by contract.	☑ Note: Includes a 3% increase year over year
4.1.10.7	Optional Renewal Year 3 Deliverable 2: Throughout contract period: Technical assistance will be performed as needed upon contact by State or Local staff.	☑
4.1.10.8	Optional Renewal Year 4 Deliverable 1: Throughout contract period: Vendor will support CMS use and provide system upgrades and maintenance as required by contract and will be prepared to respond to ensure viability of system.	☑ Note: Includes a 3% increase year over year

4.1.10.9	Optional Renewal Year 4 Deliverable 2: Throughout contract period: Technical assistance will be performed as needed upon contact by State or Local staff.	☑

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

Proc Folder:	964749	**Reason for Modification:**
Doc Description:	STATEWIDE CASE MANAGEMENT SYSTEM	
Proc Type:	Central Master Agreement	

Date Issued	**Solicitation Closes**	**Solicitation No**	**Version**
2021-11-19	2021-12-30 13:30	CRFQ 0511 OIG2200000001	1

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: 000000184365

Vendor Name : West Publishing Corporation

Address :

Street : 610 Opperman Drive,

City : Eagan

State : MN   **Country :** USA   **Zip :** 55123

Principal Contact : Sharie Kirsch, Director of Business Development

Vendor Contact Phone: (703) 419-5619   **Extension:** N/A

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

Vendor
Signature X _Sharie A. Kirsch_   **FEIN#** 41-1426973   **DATE**

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