



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

Header 6

List View

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

Procurement Folder: 964749

Procurement Type: Central Master Agreement

Vendor ID: VS0000039395

Legal Name: Cloudites

Alias/DBA:

Total Bid: \$59,575.50

Response Date: 12/17/2021

Response Time: 12:39

Responded By User ID: cyangant

First Name: Jason

Last Name: Green

Email: cyangant@gmail.com

Phone: 4155350157

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: 6

Total of All Attachments: 6



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

Solicitation Closes	Solicitation Response	Version
2022-01-13 13:30	SR 0511 ESR12172100000003727	1

VENDOR
VS0000039395
Cloudites

Solicitation Number: CRFQ 0511 OIG2200000001
Total Bid: 59575.5
Response Date: 2021-12-17
Response Time: 12:39:36
Comments:

FOR INFORMATION CONTACT THE BUYER
Crystal G Husted
(304) 558-2402
crystal.g.husted@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				0.00

Comm Code	Manufacturer	Specification	Model #
43232304			

Commodity Line Comments: Technical, Appendices and Cost Documents Attached.

Extended Description:

case management system

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Computer software licensing service				36767.50

Comm Code	Manufacturer	Specification	Model #
81112501			

Commodity Line Comments: Annual Subscription Pricing.

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	228.080000	22808.00

Comm Code	Manufacturer	Specification	Model #
81112205			

Commodity Line Comments: Fixed Fee for On-boarding and Training. Unit price is used to make your calculated total field accurate. 24x7 premium support included with the software subscription.

Extended Description:

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

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

Jason Green, Owner

(Name, Title) Jason Green, Owner

(Printed Name and Title) 2272 Whyte Park Avenue, Walnut Creek, CA, 94595

(Address) +1.415.535.0157, +1.928.437.3238

(Phone Number) / (Fax Number) cyangant@gmail.com

(email address)

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

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.

Cloudites

(Company)

Jason Green, Owner

(Authorized Signature) (Representative Name, Title)

Jason Green, Owner

(Printed Name and Title of Authorized Representative)

December 17, 2021

(Date)

+1.415.535.0157, +1.928.437.3238

(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ OIG220000001

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

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

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

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

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

Cloudites

Company

Jason Green, Owner

Authorized Signature

December 17, 2021

Date

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

West Virginia Ethics Commission
Disclosure of Interested Parties to Contracts

(Required by *W. Va. Code* § 6D-1-2)

Name of Contracting Business Entity: Cloudites Address: 2272 Whyte Park Avenue, Walnut Creek, CA, 94595

Name of Authorized Agent: Jason Green Address: 2272 Whyte Park Avenue, Walnut Creek, CA, 94595

Contract Number: CRFQ 0511 OIG220000001 Contract Description: Statewide Case Management System

Governmental agency awarding contract: Department of Administration

Check here if this is a Supplemental Disclosure

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

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

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

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

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

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

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

Signature: Jason Green, Owner

Date Signed: December 17, 2021

Notary Verification

State of _____, County of _____:

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

Taken, sworn to and subscribed before me this _____ day of _____, _____.

Notary Public's Signature

To be completed by State Agency:

Date Received by State Agency: _____

Date submitted to Ethics Commission: _____

Governmental agency submitting Disclosure: _____

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

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

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

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

DEFINITIONS:

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

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

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

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (*W. Va. Code §61-5-3*) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Cloudites

Authorized Signature: Jason Green, Owner Date: December 17, 2021

State of _____

County of _____, to-wit:

Taken, subscribed, and sworn to before me this ____ day of _____, 20__.

My Commission expires _____, 20__.

AFFIX SEAL HERE

NOTARY PUBLIC _____

Cloudites
 2272 Whyte Park Avenue
 Walnut Creek, California 94595

DATE 12/17/2021
Quotation # Q21-7227JH
Customer ID State of West Virginia

Quotation For:
 State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington St E
 Charleston, West Virginia 25305

Quotation valid until: 6/15/2022
Prepared by: Jason Green

Comments or Special Instructions: None

SALESPERSON	P.O. NUMBER	Term	SHIP VIA	F.O.B. POINT	TERMS
JG	TBD	1 Year	N/A	Dest	Per Agreed Terms

QUANTITY	DESCRIPTION	UNIT PRICE	TAXABLE?	AMOUNT
45	Service Desk User Subscription - Annual	Tier 1 Cloud Premium	T	22,550.00
45	Content Portal User Subscription - Annual	Tier 1 Cloud Premium	T	5,775.00
45	Correspondence Tools User Subscription - Annual	Tier 1 Cloud Premium	T	2,200.00
45	Single Sign-On User Subscription - Annual	Tier 1 Cloud Premium	T	2,200.00
45	Resource Management User Subscription - Annual	Tier 1 Cloud Premium	T	4,042.50
1	Onboarding - 30 to 45 Day Project	Fixed Fee	T	15,358.00
1	Training Week - Train the Trainer	Fixed Fee	T	7,450.00

SUBTOTAL	\$ 59,575.50
TAX RATE	Exempt
SALES TAX	-
OTHER	-
TOTAL	\$ 59,575.50

Cloudites Quote Confirmations

1. Cloudites confirms it has the ability to meet the insurance requirements for this work.
2. Cloudites confirms that user subscriptions are invoiced in full for the fiscal year at PO origination.
3. Cloudites confirms that the recent log4j security vulnerability does not impact this solution.



Proposal for an Integrated ITSM Solution



REQUEST FOR QUOTE CRFQ 0511 OIG220000001 STATEWIDE CASE MANAGEMENT SYSTEM
State of West Virginia

Executive Summary

Cloudites transmits herewith, as guidance for innovation to the State of West Virginia (WV) on December 17, 2021, with respect to the help desk, knowledge base, customer portal and product roadmap capabilities of WV. Anchored in the principles of equality of opportunity, nondiscrimination, respect for dignity and individual autonomy, and inclusion of and collaboration between government and community resources, this solution seeks to promote, protect, and ensure the full and equal enjoyment of approved agents and participants in a secure and highly automated ticketing and case management cloud solution. While most large organizations already enjoy these capabilities, regional government entities often face cost and time barriers when they attempt to acquire modern cloud technologies.

At its core, the integrated ITSM system deploys the same technology capabilities that exist at large corporations and provides the State with resources that lead to accelerated collaboration and increases in productivity on par with commercial organizations, when given the same opportunities. The Web 3.0 cloud computing models have made great progress toward the goals of inclusion, full community participation, and operational self-sufficiency. By becoming a party to these emerging capabilities, the State continues its leadership role and is in a great position to support, aid, and encourage other authorities to implement the same set of capabilities, thereby contributing to verifiable improvements in guaranteeing to equality of opportunity, nondiscrimination, accessibility, and reasonable accommodation through innovative advancements in operational collaboration.

I recommend that the reader give prompt and favorable consideration to the solution as proposed and give its advice and endorsement, subject to the legal terms' exceptions, if any, set forth in the accompanying response.

I certify that this response is genuine and is not made in the interest of, or on the behalf of, any undisclosed person, firm or corporation, and is not submitted in conformity with, and agreement of, any undisclosed group, association, organization, or corporation. Furthermore, I have not directly or indirectly induced or solicited any other entity to put in a false narrative, nor solicited any other person, firm or corporation to refrain from submitting a response, and have not sought by collusion to obtain any advantage over any other entity or over the State or any employee thereof.

Kindly,

Jason Green, Owner

Jason Green
Cloudites
2272 Whyte Park Avenue
Walnut Creek, CA 94595
Tel: 1-415-535-0157
Fax: 1-928-437-3238

Functionality / Technical Capabilities

Cloudites will provide the State of West Virginia (WV) with the services commensurate with the scope stated in the RFP Terms of Reference. All deliverables will be produced in accordance with the agreed Onboarding tasks that meet the minimum required target capabilities. The proposed system consists of a single platform with multiple modules provided by Atlassian's Jira Service Desk and Confluence systems, Single Sign-On (SAML 2.0 and G-Suite) Access, Tempo Resource Management, Cost Analyzer & Portfolio Planning, and Better PDF Correspondence Management.

1. Help Desk (Service Desk)

The Information Technology Service Management (ITSM) platform provides the WV's teams with the information they need when they need it. Capture value by staying aligned with the evolution of business services. Manage your centralized ITSM processes as a modern government agency. The ITSM solution is an all-inclusive platform with built-in automation and analytics that enables greater control and faster decision making across all departments. Service all WV locations within your regional footprint, increase community collaboration and implement innovative automation. Capitalize on strategic capabilities and leverage end-to-end process owners through configuration updates while moving away from legacy on-premises, custom built software systems.

2. Self Service Portal (Help Center portal)

When users access the portal, their experiences are highly informative, based upon their roles within the community. All portal content is "permissioned" to individual roles so that people only see information, content and tools that are relevant to their roles and unique profiles. The portal can be accessed from anywhere, at any time and from virtually any device with a browser and an authorized Internet or intranet connection, including tablets and smart phones. The personalization, configurability and accessibility of the portal make it a practical and convenient tool for your community interactions.

3. Roadmap Management (Content Space for Team Collaboration and Knowledge Base)

The Confluence and Tempo modules contains the majority of key features and capabilities as the roadmap team collaboration solution. In fact, for many of the productivity gains the proposal sets out to achieve, it relies on these two modules to deliver those results through the following capabilities:

- Template driven team level road map planning and resource management
- Rich, engaging presentation, including multi-media, graphics and HTML
- Intuitive content creation, editing, publication and import tools
- Information focused, matching the content to the Agent (rules are built in the Service Desk)
- Seamless integration with calendaring and document management solutions

Increasing resolution through the work performed and resolved by first response personnel lowers costs. Because of the personalization and accessibility of the knowledge base, higher rates of first touch resolution can be realized.

4. Resource Management

The resource management modules provided by Tempo enables WV to monitor, manage and systematically improve the portfolio allocations, costs and value through real-time interactive dashboard displays. The views are fully configurable using shared or private filters, single or multi project and portfolio views, and over/under allocation metrics. Align teams with tasks, visualize risks to usage, drag and drop human and non-human resources to identify opportunities and remove risks in real time. The portfolio project management boards show resources and projects in dynamic filtered views across all investment types so that informed and educated decisions can be made about how to tackle investment strategies and scenarios.

5. Workflow

The State manages many complex transactions and business processes involving forms, approvals, and multiple administrative steps. These processes often involve time-consuming manual steps. The result can be inefficiency, cause for re-work and a time sink with no clear value. The workflow module provides a robust suite of tools to facilitate designing, testing, publishing, analyzing, and optimizing complex processes as complete, efficient, and automated services. These tools are built with the functional user in mind and each set of automations can be deployed as single page applications or composite applications as needed. The tools incorporate low-code/no-code visual editors that allow a trained power user to configure and deploy a single or set of automated processes, without the need for IT involvement.

6. Service Level Agreement (SLA) Management

Meeting and exceeding customer expectations is at the core of sound service delivery. SLA's can be designed and configured according to a variety of criteria, including Process, User, Business Unit and Organization. The module includes the following features:

- Ability to define “frozen” periods to pause the SLA clock even as overall elapsed time continues to be tracked
- Dashboards to monitor SLA compliance, including ‘Warning Zones’
- Alert engines and business rules to drive pre-emptive action based on SLA events
- Performance Analysis Report to analyze and improve SLA performance

7. Questionnaire & Survey Robotics

The system includes a Questionnaire & Survey robotics feature to manage the service experience, produce intake mechanisms and gain insight into future improvement requirements. This module is embedded in the web forms and routing features of the system, enabling the workflow to initiate tasks and calculations, as well as drive future enhancements and specificity to the active workflow(s). This module includes the following capabilities:

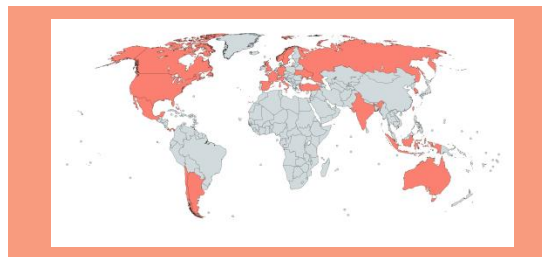
- Embedded graphical CSAT single-click survey in notifications
- Create Self-Service intake and multiple Surveys with unique Questions and Responses
- Automated rules and software robots drive many interactions with the consumers and allow for a dynamic set of decisions based on the individual responses received

- Configure workflows generate follow-up task for any activity, tasks for determination activities such as root cause, and automate definition of initiatives required for improvement
- Analytical reports to measure risk mitigation and satisfaction levels

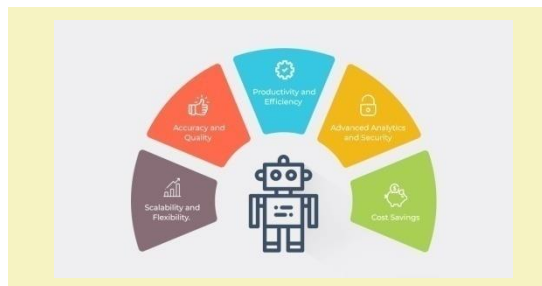
Overall Experience of Vendor & Demonstrated Results

Innovative Business Outcomes Global Cloud Solutions

My experience across more than two decades of management, consulting and industry experience is concentrated in business and organization digital advancement, continuous technology improvement and supply chain innovation initiatives.



Private and secure supply chain operations, maritime trade facilitation and cross border corporate service delivery WVEs. I build and manage global solutions focused on growth and profit through the execution of best practices, strategic positioning and value-based portfolio management.



Experience

Post
Pandemic

Cloudfites
ITSM Development
AI / 5G Technologies
Modern Cloud Strategies

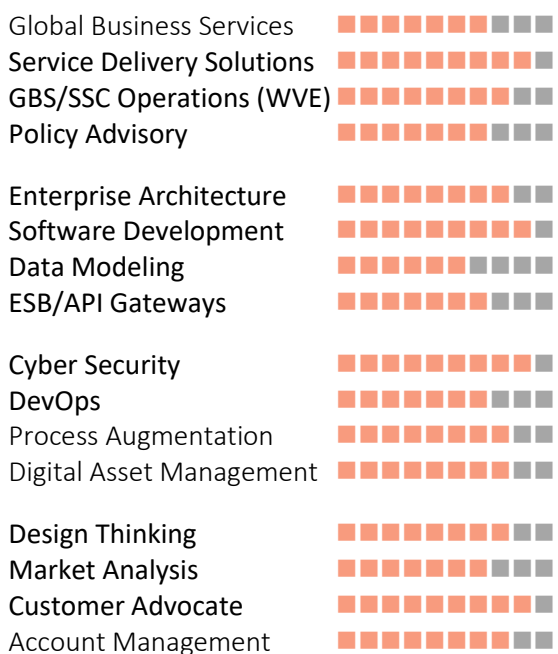
Pre
Pandemic

Neocase Software
UPS
Total Soft Bank
Ports America

Scope of
Services

Platform Development
Integration Models
Software Robotics
Digital Research

Related Skills



Installation & Support

The engagement team proposed for this solution brings extensive domain expertise and industry leadership in financial program development, analysis, engineering, technology management, best practices and ITSM systems package development. Multiple, concurrent project level work streams may be required to achieve the program goals and objectives. Coordination and communication planning across differing program milestones are closely monitored to reduce risks and costs where possible. A well-defined methodology combines low risk activities with an iterative approach to ensure that the WV deployment occurs on plan, and on budget. Cloudites deployments hold to these principles:

- Cloudites proposes solutions that, to the greatest extent possible, make use of future proof, configurable options with minimal customization – i.e., are available “out-of-the-box” and based on industry standards
- Cloudites ensures the engagement team provides early risk avoidance or mitigation and communicates knowledge regarding operations, maintenance and configuration tasks to the in-country resources, administrators, and subject matter experts
- Cloudites solutions provide for a flexible, scalable path for future expansion that optimizes capabilities and provide a path for expansion and flexibility in future program activities

Our Project Management Methodology is built upon industry standard methodologies, either PMI PMBOK/Prince2 or Agile/LEAN, depending on stakeholders and needs. These methodologies have been proven effective in a wide variety of technology projects involving software, hardware, infrastructure, and communications.

1. Project Origination

During project origination, Project Managers are assigned to the project to be involved in estimating the schedule, budget, and resource requirements, identifying project risks and assumptions. Involving the Project Manager early in the process helps us understand your needs and the commitments that have been discussed when establishing the project framework with the WV stakeholders.

2. Project Framework

The framework describes how the combined project team, stakeholders, and any 3rd party vendors interact, communicate, escalate, and report, as well as meeting times and frequency. Plan revision points are at the discretion of the team and may be a function of how well the project is working, as well as the strength of the project’s informal communications.

The Project Manager will identify the key contact people in each department, how information is communicated to all parties (email, reports, phone, etc.), how issues are escalated and the escalation process, and what status reporting is necessary, including identification of those responsible for creating the report, the recipient list, and frequency of status reporting.

3. Project Initiation

In the initiation phase the Project Manager will set up the project in accordance with Cloudites internal controls. Project planning begins, although the project plan will be developed iteratively, in more detail, as the requirements are finalized and agreed upon. Key project milestones are identified, and a resource plan is submitted.

The Project Manager creates a project implementation plan on the knowledge base, which will include the scope of work, acceptance criteria and details of the project deliverables for the project. The project implementation will be developed and reviewed with the customer's project manager (if applicable). The project manager will also hold an internal project kick-off meeting to orient all new team members to the project.

4. Kick-off Meeting

A kick-off meeting occurs shortly after project initiation. The meeting focuses on the goals and scope of the project by both teams and introduce project team members. Specific information is gathered and communicated at this point and include meeting and project objectives and deliverables, provides a place for the project team to meet and get to know each other, define roles and responsibilities, and outline the timeline, change controls and communication plans that govern the project.

5. Acceptance Criteria

This criterion describes the process by which the client validates and accepts the objectives defined as the project's tangible deliverables. These criteria are discussed and jointly developed. The Acceptance Criteria identifies the sign-off activity confirming that the system meets the requirements. It is crucial that acceptance criteria be defined and early to ensure a common definition of success for all project stakeholders.

6. Project Execution and Control

This phase is typically the longest and includes execution of the project following the plan. Control measures are used to ensure the project adheres to the plan and variances are addressed at once. During this phase, the project plan is updated regularly with status completed and any adjustments needed. Priority risks continue to be monitored. The stakeholders are given visibility through frequent status updates (as agreed upon in the project framework document) that show activities performed, milestones reached, reviewed/updated issues and action items, financial updates (if applicable) and a summary of activities and milestones scheduled for completion in the next reporting period. Project documentation will be kept in a centralized repository, which is accessible to the customer. In addition, the Project Manager are performing direct management of the project team and interface to internal management.

The Project Manager is also responsible for adherence to a formal change control process with the customer. It is often the risk that requirements may change during a project. The change control process requires that any changes to the scope of the project must be formally documented and approved by WV.

During all phases, but primarily during this phase, the Project Manager performs project audits on behalf of Cloudites management. The purpose of each audit is to provide external validation that the project is meeting Cloudites quality guidelines.

7. Project Closeout

Once the system has been deployed in production and directly after “go-live,” there is a support period during which a key member of the Cloudites engagement team will be the primary contact to the WV for customer support purposes. The objective of this period is to ensure system stabilization and WV user confidence with the design of the launched configuration. After a brief period of integrated team support, the responsibility for maintenance is transitioned to the long-term support team and procedures.

8. Quarterly Reviews

The Cloudites account management team will engage with the WV upon request, but not less than once a quarter to ensure the solution continues to meet the needs of WV. During this meeting, the account manager will present the current state of the product roadmap and key new features not previously discussed. If change orders are requested, those will also be discussed, signed, and scheduled for action.

Reputation & ITSM Past Performance

Reference 1 - 3 (2018):	Risk Management & Incident Response – Healthcare Clients
Scope of Services:	17 States, 104 Hospitals, 2,500+ Clinics, 4 Academic Health Centers, 30 Critical Access Facilities
Program Goals Achieved:	Campus Efficiencies – Reduction in HR Operational & Transaction costs Business Continuity – Provide our business with what it needs to succeed via risk and knowledge management, service level agreements, business intelligence and transparency 50% Tier Zero Self Service Inquiry Management Sustainable Global Process Standardization across all Divisions
Reference 4 @ 5 (2018):	International Monetary Financial Organizations
Scope of Services:	Multiple Global Service Centers, 10,000+ Employees
Program Goals Achieved:	Service Excellence - Tiered Service Delivery across the global population An Integrated and Unified Content Repository that ensures fast, correct, and consistent responses for each Tier of the Service Center HR Change Management Controls – Enable rapid changes that balance speed of change delivery and community adoption, removing delays that slow delivery of changing policies, regulations, and processes Powerful yet flexible multilingual portal that encourages employees to adopt Self Service and raises employee satisfaction Advanced Service Center Automation incorporating rules for handling inbound inquires and alerts/escalations, and where automated tasks are required to allow the Center to focus on the customer

Appendix A – Requirements Accompanying Document

Unless otherwise addressed in our answer to the line item, the terms “etc.”, “but not limited to”, “as needed”, and “comprehensive” are ambiguously obscure extensions of the requirement and provide insufficient clarity to be considered within the scope of the presented requirement.

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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must be modular to allow system upgrades and enhancements.	The proposed solution fully meets the requirement as presented in the RFQ.
System must be scalable to accommodate unlimited persons, cases, contacts, activity transactions, and reports.	The proposed solution fully meets the requirement as presented in the RFQ.
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 type and categories, places including counties, municipalities, towns, and zip codes, telephone types, definition and content of picklists and user options within fields, categories and classifications, key performance indicators including targets, thresholds, and alerts, file management and data retention.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide administrator(s) the ability to create messages that are targeted to specific users, user groups, or all users and incorporate a positive notification via email or a visual cue displayed on the users login screen or home page.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must enable real time collaboration or access sharing with users.	The proposed solution fully meets the requirement as presented in the RFQ.
System must enable access on multiple device types (tablet, mobile phone, desktop computer, laptop) and allow for speech-to-text functionality where applicable.	The proposed solution fully meets the requirement as presented in the RFQ.

Unless otherwise addressed in our answer to the line item, the terms “etc.”, “but not limited to”, “as needed”, and “comprehensive” are ambiguously obscure extensions of the requirement and provide insufficient clarity to be considered within the scope of the presented requirement.

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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must maximize capabilities to reduce redundant data entry and keystrokes.	The proposed solution fully meets the requirement as presented in the RFQ.
System must be configurable to meet the requirements of the client.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide access to all applications and appropriate user documentation, vendor use, and help tools within a single site.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System function must incorporate spell check, cut and paste, and other routine word processor functions throughout narrative fields.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow users to return to recently accessed records or activities.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide for multiple address lines for notation as needed.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow for entry of foreign characters.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support the full case management lifecycle from initial contact to case closure.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide a way to navigate a case summary view.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among and between users.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.

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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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must enable administrative development of data field labels, data field characteristics, data field picklists.	The proposed solution fully meets the requirement as presented in the RFQ.
System must permit designation of holidays for business day versus calendar day calculations.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support user-defined workflow rules.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow of the users to set a specific list of favorites including searches, templates and contacts.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow administrator to add, control and update user role-based security permissions by user or user group types.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide for single sign on authentication.	The proposed solution fully meets the requirement as presented in the RFQ.
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 charge.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
For any system failure, the application must be restored at either the primary location or the back-up location within 24 hours.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
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.).	The proposed solution fully meets the requirement as presented in the RFQ.

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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.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support ad hoc workflows and incorporated, automatic generation of related tasks.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow user to define items requiring approval and provide alerts for those items.	The proposed solution fully meets the requirement as presented in the RFQ.
System must include monitoring functionality allowing progress to be monitored and alerts and reminders generated when the workflow nears completion.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support templates as form letters, fill in form letters, customized for letters, or custom letters and using integrated HTML editor without Microsoft Word.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support the capability to create output in hard copy, paper letters, email, and social media/digital messaging.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support the capability to set default printers for hard copy output.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support the ability for mass generation of outgoing correspondence.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow retention of photo images, audio and video files within contact records as needed.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide simple search capabilities to determine whether a caller, person, or case record already exists to avoid duplication.	The proposed solution fully meets the requirement as presented in the RFQ.

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System must enable users to search picklists using drop down menus and predictive texts.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide a quick search capability based on a single field as well as an advanced capability incorporating multiple fields and filters.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow document attachments to be associated with a record, indexed, and searched by indexed fields.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow documents to be scanned into person and case records, indexed, and searched by indexed field.	The proposed solution fully meets the requirement as presented in the RFQ.
System must allow complaints or cases to be associated with one another.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide resource searching tools to quickly locate records for efficient provision of information and referrals.	The proposed solution fully meets the requirement as presented in the RFQ.
System data and documents must be searchable to enable statistics and reports.	The proposed solution fully meets the requirement as presented in the RFQ.
Name field must include capacity to enter and store nicknames, appellations, and suffixes.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must enable users to identify history of previous complaints involving a caller, person, or case.	The proposed solution fully meets the requirement as presented in the RFQ.
System must support automated or manual assignment of a unique case identifier upon creation of a new case.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.

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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 data fields, age of referral and status of referral.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditional highlighting for importance variances to targets.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide capability for dashboard reports to drill down to underlying data.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide ability to redact a document as needed prior to printing.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide capacity to create and generate both standard and ad hoc reports.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide for historical reports to show trends and comparisons between time periods.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide for generation and distribution of standard and ad hoc reports at regular intervals as set by users with role-defined permissions.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide a library of standard reports supporting common aspects of case management and investigatory practice.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future like reports.	The proposed solution fully meets the requirement as presented in the RFQ.
System must provide standard user activity and history reports.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.
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.	The proposed solution fully meets the requirement as presented in the RFQ.

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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. The proposed solution fully meets the requirement as presented in the RFQ.

System must capture and record all case details, e.g., communication records between investigators and interview subjects, copies of inbound and outbound emails, etc. The proposed solution fully meets the requirement as presented in the RFQ.

System must maintain a chronological and auditable trail of activity by user and case, including a history of modifications to all data and event logs by record and user. The proposed solution fully meets the requirement as presented in the RFQ.

System must track user login and logout history. The proposed solution fully meets the requirement as presented in the RFQ.

System must support creation of a call record at the time of contact or after the fact. The proposed solution fully meets the requirement as presented in the RFQ.

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 entry. The proposed solution fully meets the requirement as presented in the RFQ.

System must provide a web-based application interface compatible with recent versions of Internet Explorer, Microsoft Edge, Google Chrome, Firefox, Apple Safari. The proposed solution fully meets the requirement as presented in the RFQ.

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. The proposed solution fully meets the requirement as presented in the RFQ.

System must provide means for administrators to update the look and content of the public facing portal and the content of the administrator-created content on associated web links. The proposed solution fully meets the requirement as presented in the RFQ.

System must provide a public facing online portal with the option for digital consumer engagement tools (SMS, live chat). The proposed solution fully meets the requirement as presented in the RFQ.

System must provide a customizable web form incorporating a challenge response test such as CAPTCHA. The proposed solution fully meets the requirement as presented in the RFQ.

System must provide a public facing web portal that meets Web Content Accessibility Guidelines (WCAG) version 2.1. The proposed solution fully meets the requirement as presented in the RFQ.

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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.

The proposed solution fully meets the requirement as presented in the RFQ.

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