



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 @ 4

List View

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

Procurement Folder: 1228506	SO Doc Code: CRFQ
Procurement Type: Central Master Agreement	SO Dept: 0506
Vendor ID: <input type="text" value="000000163397"/>	SO Doc ID: MIS23000000003
Legal Name: LOCAL DATA SOLUTIONS LLC	Published Date: 6/9/23
Alias/DBA:	Close Date: 6/29/23
Total Bid: \$75,000.00	Close Time: 13:30
Response Date: <input type="text" value="06/29/2023"/>	Status: Closed
Response Time: <input type="text" value="12:21"/>	Solicitation Description: <input type="text" value="CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM"/>
Responded By User ID: <input type="text" value="localdatasol"/>	Total of Header Attachments: 4
First Name: <input type="text" value="Parmjit"/>	Total of All Attachments: 4
Last Name: <input type="text" value="Singh"/>	
Email: <input type="text" value="contact@localdatasolutions.c"/>	
Phone: <input type="text" value="3049068449"/>	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	One Time Implementation	0.00000	EA	75000.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:

One Time Implementation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Initial Year Term	5.00000	YR	15000.000000	75000.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:

Initial Year Term

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Year One Optional Renewal	0.00000	YR	35000.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:

Year One Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Year Two Optional Renewal	0.00000	YR	35000.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:

Year Two Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Year Three Optional Renewal	0.00000	YR	35000.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments:

Extended Description:

Year Three Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Additional user licenses	1.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Unlimited users.

Extended Description:
Additional user licenses

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MIS2300000003

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.

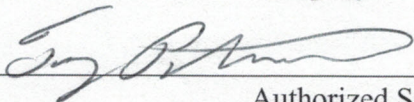
Addendum Numbers Received:

(Check the box next to each addendum received)

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

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

Local Data Solutions
Company


Authorized Signature

6/29/2023
Date

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.

(Printed Name and Title) Ty Petrice - Project Manager / CEO
(Address) 144 Scenery Dr., Morgantown, WV 26505
(Phone Number) / (Fax Number) 304-641-1767
(Email address) ty@localdatasolutions.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract 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/Contract 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 this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; 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; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Local Data Solutions
(Company)
Ty Petrice
(Signature of Authorized Representative)
Ty Petrice - Project Manager / CEO
(Printed Name and Title of Authorized Representative) (Date)
304-641-1767
(Phone Number) (Fax Number)
ty@localdatasolutions.com
(Email Address)



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: 1228506				Reason for Modification:	
Doc Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM					
Proc Type: Central Master Agreement					
Date Issued	Solicitation Closes	Solicitation No			Version
2023-05-24	2023-06-15 13:30	CRFQ 0506 MIS2300000003			1

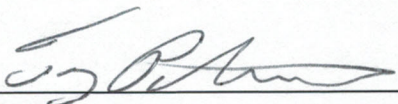
BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: 000000163397
 Vendor Name: Local Data Solutions
 Address: 144 Scenery Dr
 Street:
 City: Morgantown
 State: WV Country: USA Zip: 26505
 Principal Contact: Ty Petrice
 Vendor Contact Phone: 304-641-1767 Extension:

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

Vendor Signature X  FEIN# 26-2017671 DATE 6/29/2023

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

ADDITIONAL INFORMATION

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR A 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 INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX BLDG 6, RM 817-B CHARLESTON WV US		HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	One Time Implementation	0.00000	EA	<i>\$75,000.00</i>	<i>\$75,000.00</i>

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
One Time Implementation

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Initial Year Term	5.00000	YR	<i>\$3,000.00</i>	<i>\$3,000.00</i>

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Initial Year Term

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Year One Optional Renewal	0.00000	YR	<i>\$35,000.00</i>	<i>\$35,000.00</i>

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year One Optional Renewal

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
4	Year Two Optional Renewal	0.00000	YR	<i>\$35,000.00</i>	<i>\$35,000.00</i>

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year Two Optional Renewal

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
5	Year Three Optional Renewal	0.00000	YR	<i>\$35,000.00</i>	<i>\$35,000.00</i>

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year Three Optional Renewal

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
6	Additional user licenses	1.00000	EA	<i>\$0.00</i>	<i>\$0.00</i>

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Additional user licenses *unlimited users*

SCHEDULE OF EVENTS

Line	Event	Event Date
1	VENDOR QUESTION DEADLINE	2023-06-01

	Document Phase	Document Description	Page 5
MIS2300000003	Final	CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Cloud Based Statewide Case Management System (CBSCMS)

Project Proposal

Local Data Solutions, LLC

June 25, 2023

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Overview

The enterprise level, cloud-based, West Virginia Statewide Case Management System is a tool that will be used by the office of the Foster Care Ombudsman (FCO), mandated by state statute W.V. Code §9-5-27, this newly established child welfare-directed service is responsible for advocating for the rights of foster children and foster parents; participating in any procedure to investigate and resolve complaints filed on behalf of a foster child or foster parent; monitoring the development and implementation of federal, state, and local legislation, regulation and policies with respect to foster care services; and establishing and maintaining a statewide uniform report system to collect and analyze data relating to complaints for the purpose of identifying and resolving significant problems faced by foster children and foster parents as a class. The system will help FCO responsible for generating and distributing periodic reports prepared to standard and ad hoc specifications to serve the needs and interests of various stakeholder groups. The system will also enable FCO receive, evaluate, refer, assign, monitor, investigate, and report on child-welfare related concerns, complaints, and otherwise identified systemic issues as determined by the FCO or assigned/recommended by its stakeholders inside and outside state government. Web based system will also increase ease of use and availability.

Any additional requirements not identified that are discovered during the requirements phase will require adjustments in the planning. The scope will need to be finalized to ensure customer expectations are within the proposed resources on the project. Support for the server access will be managed by Local Data Solutions IT team. Application support following deployment is recommended to ensure any future enhancements, bug fixes, and refinements can be addressed.

Local Data Solutions, LLC

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

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

systems for the Health Effects Laboratory Division and the Division of Safety Research, serving as project leads and managing numerous other software developers and supporting staff.

A custom application solution requires professional planning from the beginning, and our experienced analysts and programmers have a comprehensive understanding of the technical and personal aspects involved in software development, including requirements analysis, UX/UI design approaches, programming, system infrastructure, and more. Our highly trained team uses modern and proven approaches with technologies to determine and address your organization's needs. LDS maintains **cyber liability insurance** of at least **\$5,000,000** for hosting secure data in systems that we develop.

Professional History

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

WVU Birth Score Database (WVU & WVDHHR)

[Dashboard](#) and [Client](#) Application

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

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

West Virginia Home Visitation System (WVHVS, WVDHHR)

[Admin Dashboard](#) and [Home Visit Portal](#) Application

The WV Home Visitation System involves partnerships at federal, state and community levels to assist families in meeting their parenting goals. Programs are available at no cost to families across the state. Programs are delivered by local home visitors who have received extensive training in evidence-based curriculums. The family makes the choice to enroll and invite home visitors into their home. All programs can be initiated during pregnancy and continue to age three to five. Using a family-centered, asset-building approach, families determine what issues they want to address. The intent of the program is to partner with families so children grow up healthy, strong and ready to learn. LDS is developing and is hosting the administration dashboard and home visit portal applications.

West Virginia Newborn Hearing Screening (WV NHS, WVDHHR)

[Dashboard](#) and [Client](#) Application

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

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

West Virginia Prenatal Risk Screening Instrument (WV PRSI, WVDHHR)

[Dashboard](#) and Client Application

The **West Virginia Prenatal Risk Screening Instrument (WV PRSI)** is the tool REQUIRED by WV law to be submitted by every maternity provider of care for women in West Virginia. The PRSI is required for all West Virginia women on their initial obstetrical visit regardless of payment source. Providers shall notify the woman of any identified high-risk conditions and provide referrals as necessary. All information is used only for data analysis of at-risk/high-risk pregnancies and planning purposes by public health officials.

LDS is in process of developing and is hosting the WV PRSI system, **a case-management system** for the **WVDHHR**. This system is designed to automate and simplify many of the tasks related to managing PRSI instrument data. In addition, the system will produce annual reports that will be submitted to the CDC. The application will be composed of two separate interfaces. The first interface is for internal administrators of the system. The administrators be able to manage all user roles, approve/deny medical provider registration upon their own internal verification process, manage medical provider password resets, and review/report on submissions. The second interface is for the medical providers. Medical providers be able to apply for an account, manage their account information, request a password reset, create, edit, manage and submit PRSI forms. This system is **HIPAA-compliant** and meets or exceeds federal information-technology security requirements.

WVU Center for Excellence in Disabilities (CED, WVU)

[Dashboard](#) Application

Established in 1978, the **Center for Excellence in Disabilities (CED)** is in Morgantown, West Virginia and has a satellite office in Big Chimney, West Virginia with staff located in offices across the state to better serve clients in their communities. CED serve as a resource to the community in the areas of education, research and service as it relates to the needs of people with disabilities.

WVU Center of Excellence for Disabilities web-based system consolidates the current databases supporting 20+ programs under one unified umbrella. This consolidation leads to unified view of the member/client medical data records across different programs.

Faculty And Compensation Tracking System (FACTS, WVU)

[Dashboard](#) Application

The **West Virginia University School of Medicine** tool to manage faculty compensation tracking. The application migrated and duplicated the legacy MS Access database functionality, add role-based access, and provide additional functionality such as tracking history of changes. This system is designed to automate and simplify many of the tasks related to faculty, residents and courtesy members onboarding, contracts documentation, management, and reporting requirements. The system integrates with Multi-factor Authentication implemented and used by HSC Information Technology Services seamlessly. This system is also **HIPAA-compliant** and meets or exceeds federal information-technology security requirements.

West Virginia Center for End-of-Life Care e-Directive Registry Management System (WV EoL, WVU)

[Dashboard](#) Application

The WV e-Directive Registry, established by the WV Center for End-of-Life Care, allows patients to securely store their advance care planning forms and have them readily available for treating health care providers. The e-Directive Registry is the nation's most comprehensive database of its kind. LDS has developed and hosting e-Directory Registry management system for WV EoL, WVU that simplifies, organize, and manages data workflows for patient documents and information. This Registry management system houses and makes available to treating health care providers West Virginians' advance directive forms, do not resuscitate (DNR) cards, and POST forms. The e-Directive Registry allows these forms to be available 24/7 in the event of an emergency.

West Virginia Network for Infection Control and Epidemiology (WV-NICE, WVU-Marshall University & WVDHHR)

[WV NICE](#)

The **West Virginia Network for Infection Control and Epidemiology (WV-NICE)** is a collaborative effort between Marshall University and West Virginia University to create regional consultation centers for infection prevention and control. The project is funded by grants awarded to the **School of Medicine at both institutions through West Virginia Department of Health and Human Resources (WVDHHR)**. The mission is to provide expert advice, education, and training in the areas of infectious diseases, infection control and infection prevention to facilities and organizations in West Virginia. This will enhance access to evidence-based infection prevention and control strategies for all West Virginians

Student Rotations System, School of Nursing, WVU

[Student Rotations](#)

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

West Virginia Health Careers and Opportunity Program, Health Sciences and Technology Academy (WVU)

[HSC Healthcare Opportunities](#)

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

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

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

Microsoft Azure Secure Applications Platform

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

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

Design and Operational Security

- **Security Centers of Excellence.** The Microsoft Digital Crimes Unit, Microsoft Cybercrime Center, and Microsoft Malware Protection Center provide insight into evolving global security threats.
- **Security Development Lifecycle (SDL).** Since 2004, all Microsoft products and services have been designed and built from the ground up using its Security Development Lifecycle - a comprehensive approach for writing more secure, reliable and privacy-enhanced code.
- **Operational Security Assurance (OSA).** The Microsoft OSA program provides an operational security baseline across all major cloud services, helping ensure key risks are consistently mitigated.
- **Assume Breach.** Specialized teams of Microsoft security engineers use pioneering security practices and operate with an "assume breach" mindset to identify potential vulnerabilities and proactively eliminate threats before they become risks to customers.
- **Incident Response.** Microsoft operates a global 24x7 event and incident response team to help mitigate threats from attacks and malicious activity.

Security Controls and Capabilities

- **24-hour monitored physical security.** Datacenters are physically constructed, managed, and monitored to shelter data and services from unauthorized access as well as environmental threats.
- **Monitoring and logging.** Security is monitored with the aid of centralized monitoring, correlation, and analysis systems that manage the large amount of information generated by devices within the environment and providing timely alerts. In addition, multiple levels of monitoring, logging, and reporting are available to provide visibility to customers.
- **Patching.** Integrated deployment systems manage the distribution and installation of security patches. Customers can apply similar patch management processes for Virtual Machines deployed in Azure.
- **Antivirus/Antimalware protection.** Microsoft Antimalware is built in to Cloud Services and can be enabled for Virtual Machines to help identify and remove viruses, spyware and other malicious software and provide real time protection. Customers can also run antimalware solutions from partners on their Virtual Machines.
- **Intrusion detection and DDoS.** Intrusion detection and prevention systems, denial-of-service attack prevention, regular penetration testing, and forensic tools help identify and mitigate threats from both outside and inside of Azure.
- **Zero standing privileges.** Access to customer data by Microsoft operations and support personnel is denied by default. When granted, access is carefully managed and logged. Data center access to the systems that store customer data is strictly controlled via lock box processes.
- **Isolation.** Azure uses network isolation to prevent unwanted communications between deployments, and access controls block unauthorized users. Virtual Machines do not receive inbound traffic from the Internet unless customers configure them to do so.
- **Azure Virtual Networks.** Customers can choose to assign multiple deployments to an isolated Virtual Network and allow those deployments to communicate with each other through private IP addresses.
- **Encrypted communications.** Built-in SSL and TLS cryptography enables customers to encrypt communications within and between deployments, from Azure to on-premises datacenters, and from Azure to administrators and users.
- **Private connection.** Customers can use ExpressRoute to establish a private connection to Azure datacenters, keeping their traffic off the Internet.

- **Data encryption.** Azure offers a wide range of encryption capabilities up to AES-256, giving customers the flexibility to implement the methods that best meets their needs.
- **Identity and access.** Azure Active Directory enables customers to manage access to Azure, Office 365 and a world of other cloud apps. Multi-Factor Authentication and access monitoring offer enhanced security.

Independent Verification

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

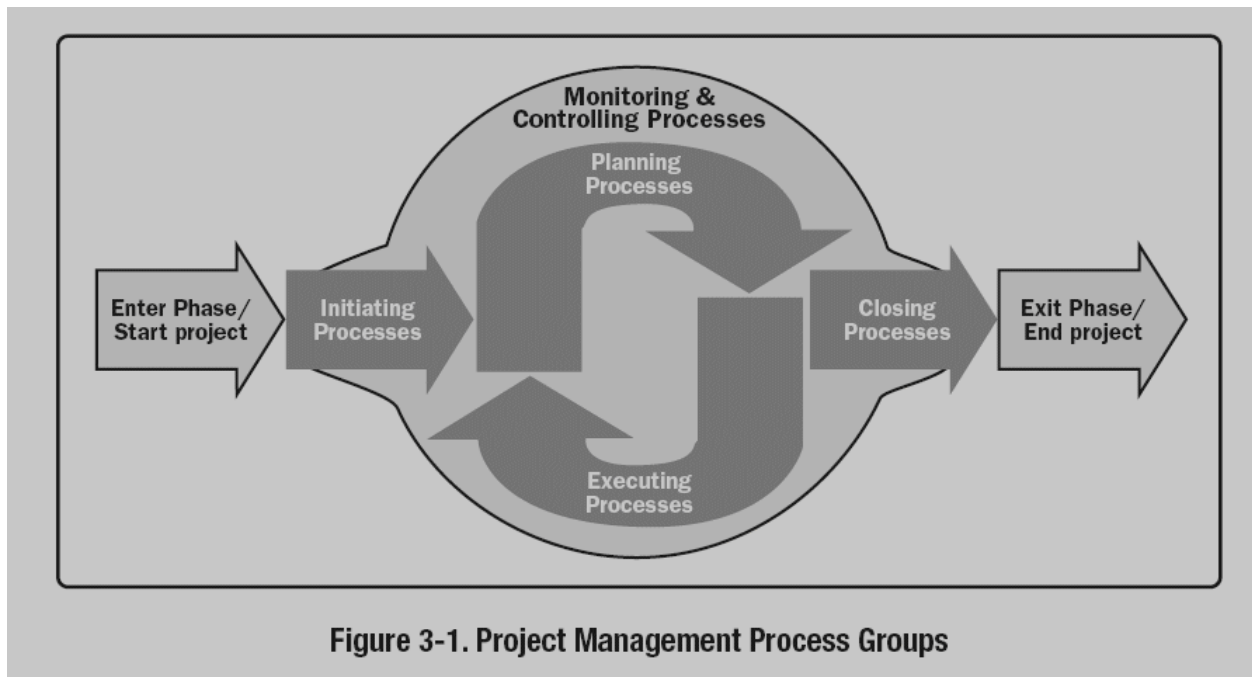
In addition, Microsoft has developed an extensible compliance framework that LDS utilizes to enable us to design and build services using a single set of controls, to speed up and simplify compliance across a diverse set of regulations and rapidly adapt to changes in the regulatory landscape. More information on specific compliance programs is available here:

<https://www.microsoft.com/en-us/TrustCenter/Compliance/default.aspx>.

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

LDS Software-Development Process Overview

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



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

LDS's high-level process steps are:

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

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

concerns for the project. Only then do we are being project planning, in accordance with the stakeholders' needs and desires.

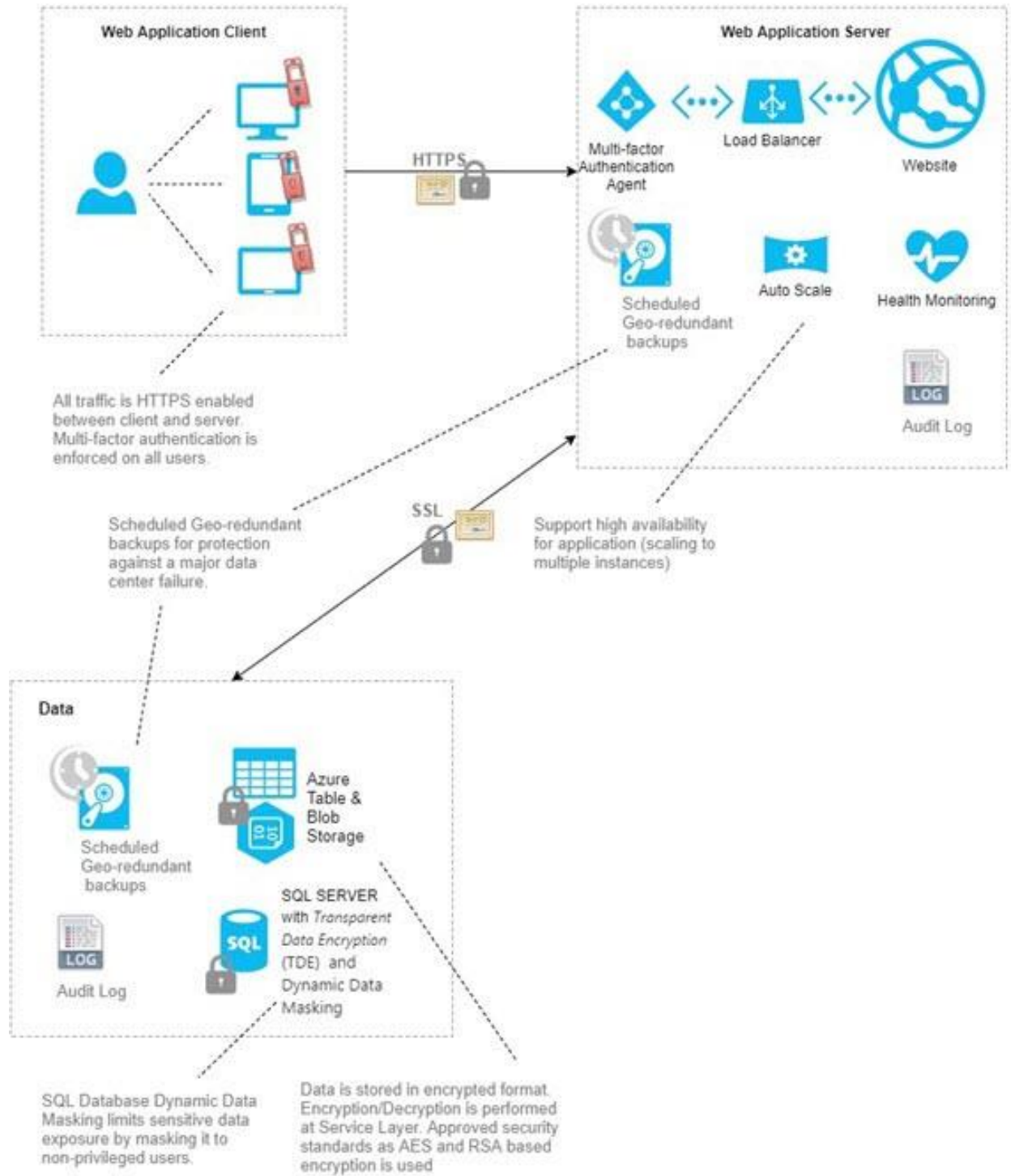
Careful, thorough planning clarifies the system needs and efficiencies, and once planning activities are complete, we again consult with the client regarding the overall design. Prior to execution, the client will have repeated opportunities to review and sign off on the design, and this approval launches the execution of project development.

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

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

Architecture Overview

Application Network Diagram



Statement of Work / Mandatory Requirements:

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

- Enterprise level, Cloud-Based, statewide case management system which must be compatible with the West Virginia Office of Technology's current operating system, Windows 11.

LDS system will be compliant with Windows 11

- System must be modular to allow system upgrades and enhancements, must be scalable for increasing the number of licensed users and to support unlimited persons, cases, contacts, activity transactions, and reports.

LDS system will allow system upgrades and enhancements, will be scalable for increasing the number of licensed users and support unlimited persons, cases, contacts, activity transactions, and reports.

- System must have administrative ability to create enterprise-wide announcements to be displayed on the user home page, which can be targeted to all users, or specific group users, or specific users. System must enable real time collaboration or access sharing with system users.

LDS system will have administrative ability to create enterprise-wide announcements to be displayed on the user home page, which can be targeted to all users, or specific group users, or specific users. System will enable real time collaboration or access sharing with system users.

- System must allow for speech to text functionality where applicable, and be accessible from laptops, desktops, and tablets.

LDS system will allow for speech to text functionality where applicable, and be accessible from laptops, desktops, and tablets.

- System must provide the capability for authorized users to drill down to individual data elements in dashboard reports. System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task and case status monitoring by case, user, team, and/or enterprise.

LDS system will provide the capability for authorized users to drill down to individual data elements in dashboard reports. System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task and case status monitoring by case, user, team, and/or enterprise.

- System must provide a quick search capability based on a single and or an advanced multiple field/filters.

LDS system will provide a quick search capability based on a single and or an advanced multiple field/filters.

- System must allow name fields must include capacity to enter and store nicknames,

appellations, and suffixes.

LDS system will allow name fields to include capacity to enter and store nicknames, appellations, and suffixes.

- System must maintain a chronological and reportable audit trail of activity by user and/or case, including a history of modifications to all data and event logs by record and/or user.

LDS system will maintain a chronological and reportable audit trail of activity by user and/or case, including a history of modifications to all data and event logs by record and/or user.

- System must allow administrators to add, delete, change, or control user role-based security permissions by users or user group types.

LDS system will allow administrators to add, delete, change, or control user role-based security permissions by users or user group types.

- System must provide access to all applications and user documentation, vendor use, and help tool within a single site. System must integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs. System must allow document attachments to be scanned and associated with one or more person/case records, as well as complaints, notes, and other identifiers. System must allow documents to be thumbnail/first page previewed prior to full access.

LDS system will provide access to all applications and user documentation, vendor use, and help tool within a single site. The system will integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs. The system will allow document attachments to be scanned and associated with one or more person/case records, as well as complaints, notes, and other identifiers. The system will allow documents to be thumbnail/first page previewed prior to full access.

- System must support users and administrators to schedule and prompt future date tasks, activities, calls, and follow- ups, and do so with role-based permissions, to other users.

LDS system will support users and administrators to schedule and prompt future date tasks, activities, calls, and follow- ups, and do so with role-based permissions, to other users.

- System must allow users to return to using a quick search feature to the three (3) most recently accessed records or activities. System must provide capabilities to determine whether a caller, a person, or case record already exists to avoid duplication. System must provide a means to merge identified duplicate records.

LDS system will allow users to return to using a quick search feature to the three (3) most recently accessed records or activities. The system will provide capabilities to determine whether a caller, a person, or case record already exists to avoid duplication. The system will provide a means to merge identified duplicate records.

- 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, and collaterals. System must allow addresses to be United States Postal

Service (USPS) validated. System must also allow entry of foreign addresses and characters. System must allow for APO (Military) addresses if individuals are deployed or stationed overseas.

LDS system will 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, and collaterals. The system will allow addresses to be United States Postal Service (USPS) validated. The system will also allow entry of foreign addresses and characters. The system will allow for APO (Military) addresses if individuals are deployed or stationed overseas.

- System must allow retention/display of photographic images, audio and video files in their native format within contact records as needed. System must support documentation storage within a case or record, in all common formats including Portable Document Format (PDF), Microsoft Suite, Google Docs, etc. and must be document level searchable.

LDS system will allow retention/display of photographic images, audio and video files in their native format within contact records as needed. The system will support documentation storage within a case or record, in all common formats including Portable Document Format (PDF), Microsoft Suite, Google Docs, etc. and must be document level searchable.

- System must provide capability for person and case specific alerts to be set by users, such as status indicators and validation messages, to provide feedback to users when accessing a case or record. System must support full case management workflow enabling labels (i.e., receive complaint, preliminary data collection, investigation, in process, awaiting approval to close, etc.) and time tracking by status, workflow from initial contact to case closure.

LDS system will provide capability for person and case specific alerts to be set by users, such as status indicators and validation messages, to provide feedback to users when accessing a case or record. The system will support full case management workflow enabling labels (i.e., receive complaint, preliminary data collection, investigation, in process, awaiting approval to close, etc.) and time tracking by status, workflow from initial contact to case closure.

- System must support automated or manual assignment of a unique case identifier upon creation of a new case. System must provide a way to navigate a case summary view. System must support correspondence production including letter and email templates, then can be connect to workflows, can be auto populated with case record or person specific data, and can be transmitted and timestamped.

LDS system will support automated or manual assignment of a unique case identifier upon creation of a new case. The system will provide a way to navigate a case summary view. System must support correspondence production including letter and email templates, then can be connect to workflows, can be auto populated with case record or person specific data, and can be transmitted and timestamped.

- System must support the ability to generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list. System must support templates as form letters, fill-in form letters, customized form letters, or custom

letters using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word. System must support capability to create output in hard copy, paper letters, emails, or Google Docs.

LDS system will support the ability to generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list. The system will support templates as form letters, fill-in form letters, customized form letters, or custom letters using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word. The system will support capability to create output in hard copy, paper letters, emails, or Google Docs.

- 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. System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users. System must provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.

LDS system will 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 system will support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users. The system will provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.

- 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.

LDS system will 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.

- System must include monitoring functionality allowing progress to be monitored and alerts/reminders generated when workflow nears completion or needs approval.

LDS system will include monitoring functionality allowing progress to be monitored and alerts/reminders generated when workflow nears completion or needs approval.

- System must provide means for administrators to update the look and content of the public facing portal and the administrator created content on associated weblinks.

LDS system will provide means for administrators to update the look and content of the public facing portal and the administrator created content on associated weblinks.

- System must provide a public facing portal that enables modification of text size and other page appearance qualities to comply with the Americans with Disabilities Act (ADA) standards as well as industry standard login/password requirements. System must provide a customizable web form incorporating a CAPTCHA response test.

LDS system will provide a public facing portal that enables modification of text size and other page appearance qualities to comply with the Americans with Disabilities Act (ADA) standards as well as industry standard login/password requirements. The system will provide a customizable web form incorporating a CAPTCHA response test.

- System must enable administrative development of data field labels, characteristics, and picklists. System must also enable users to search picklists using drop down menus.

LDS system will enable administrative development of data field labels, characteristics, and picklists. The system will also enable users to search picklists using drop down menus.

- System must allow automation of business practices of the agency and allow administrators to create workflow within the application. System also allows for users to set a specific list of favorites, such as searches, templates, and contacts. System must also provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets.

LDS system will allow automation of business practices of the agency and allow administrators to create workflow within the application. The system will also allow for users to set a specific list of favorites, such as searches, templates, and contacts. The system will also provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets.

- System must provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and level of detail required. System must provide for historical reports to show trends and comparisons between time periods. System must provide for generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions. System must provide a library of standard reports supporting common aspects of case management and investigatory practice. System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future reports. System reporting engine must allow report writers to create, publish, schedule, and distribute standard and ad hoc reports in varying formats including graphs and charts.

LDS system will provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and level of detail required. The system will provide historical reports to show trends and comparisons between time periods. The system will provide generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions. System must provide a library of standard reports supporting common aspects of case management and investigatory practice. The system will provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future reports. The system reporting engine will allow report writers to create, publish, schedule, and distribute standard and ad hoc reports in varying formats including graphs and charts.

- System upgrades, enhancements, and error corrections must be at no additional cost/charge

when such upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.

LDS system will provide upgrades, enhancements, and error corrections must be at no additional cost/charge when such upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.

- 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.

LDS system will 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.

West Virginia Home Visitation Program System Cost

System Development & Hosting Cost

Task	Qty.	Unit Price	Total Price
One Time Implementation	1	\$75,000.00	\$75,000.00
Initial Year Term	5	\$3,000.00	\$15,000.00
Year One Optional Renewal	1	\$35,000.00	\$35,000.00
Year Two Optional Renewal	1	\$35,000.00	\$35,000.00
Year Three Optional Renewal	1	\$35,000.00	\$35,000.00
Additional user licenses	1	\$0.00	\$0.00
Subtotal			\$195,000.00

Contact Information and Staffing

Business/Contractual Contact

Name	Ty Petrice, MSE
Role	Program Manager/CEO
Phone	304-641-1767
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Technical Resources Contacts

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Role	Lead Analyst/Senior Software Developer
Phone	304-906-8449
Email	PSingh@localdatasolutions.com

Name	Adam Phillips, BS
Role	Senior Software Developer
Email	Adam@localdatasolutions.com

Name	John Britton, BS
Role	Senior Software Developer
Email	JBritton@localdatasolutions.com

References

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Project	WV Birth Score Program
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Name	Kathy Cummons
Position	Director, DIVISION OF RESEARCH, EVALUATION, AND PLANNING
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