

# FAX COVER SHEET

TO	Bid Clerk
COMPANY	Department of Administration, Purchasing Division
FAX NUMBER	13045583970
FROM	Jason Stanis
DATE	2022-09-21 17:20:41 GMT
RE	Team Ignite RFI Response for West Virginia BMS Modernization of CMS and IMS

## COVER MESSAGE

On behalf of Ignite Group and our teaming partner Appian, we thank you for the opportunity to respond to your request for information on developing a modernized Case Management System (CMS) and Incident Management System (IMS) in support of the West Virginia (State) Department of Health and Human Resources (DHHR) Bureau for Medical Services (BMS) Home and Community-Based Services (HCBS) waiver programs. As detailed in our response, our team has demonstrated capabilities in leveraging Appian's best-in-class technology to optimize case management and incident management systems for a wide variety of businesses and use cases. We have thoroughly reviewed the request for information (RFI) you provided and compiled our comments and relevant capabilities into our response.

We are confident that our team can provide the highest quality and best valued solution to the State of West Virginia. If you have any questions regarding our response or if there is any additional information you require, I can be reached by phone anytime at (517) 505-7039 or by email at [jason@ignitegroup.com](mailto:jason@ignitegroup.com).

**BID RECEIVED LATE**

**BUYER** Melissa Dettler

**WITNESS** Jessica L Horvath

**DISQUALIFIED**

09/21/22 13:56:54  
Purchasing Division

West Virginia Purchasing Division  
**RECEIVED**  
 Date: 9/21/2022  
 Time: 1:56 - Late  
 By: Taher Fenech



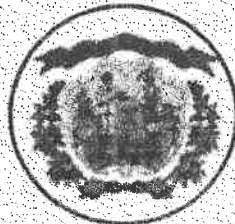
# Response for:

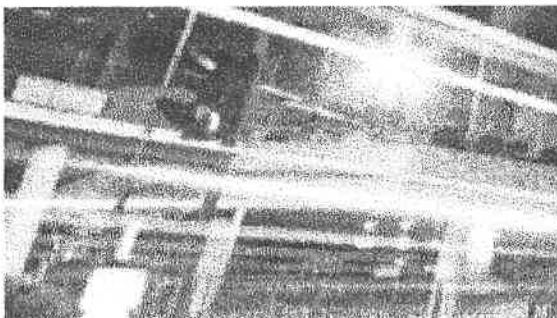
Request for Information (RFI)  
RFI#: CRFI 0155 BMS2300000001

*Modernization of Case Management System (CMS)  
and Incident Management System (IMS)*

**Team Ignyte RFI Response**  
**Date Prepared:** *September 21, 2022*  
**Name/Title:** Jason Stanis, CTO

**Signature:** 

<b>Prepared For:</b>		<b>State of West Virginia</b>
Crystal G Husted, <a href="mailto:crystal.g.husted@wv.gov">crystal.g.husted@wv.gov</a>		



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September 21, 2022

To whom it may concern,

On behalf of Ignyte Group and our teaming partner Appian, we thank you for the opportunity to respond to your request for information on developing a modernized Case Management System (CMS) and Incident Management System (IMS) in support of the West Virginia (State) Department of Health and Human Resources (DHHR) Bureau for Medical Services' (BMS) Home and Community-Based Services (HCBS) waiver programs. As detailed in our response, our team has demonstrated capabilities in leveraging Appian's best-in-class technology to optimize case management and incident management systems for a wide variety of businesses and use cases. We have thoroughly reviewed the request for information (RFI) you provided and compiled our comments and relevant capabilities into our response.

**This RFI response includes:**

- An overview of our organization and partnership with Appian
- Our responses to your RFI questions
- A high-level quote for our recommended approach and solution

We are confident that our team can provide the **highest quality and best valued solution** to the State of West Virginia. If you have any questions regarding our response or if there is any additional information you require, I can be reached by phone anytime at (517) 505-7039 or by email at [jason@ignytegroup.com](mailto:jason@ignytegroup.com).



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## CORPORATE OVERVIEW

**Ignyte Group, Inc. (Ignyte)** is a digital transformation consulting firm specializing in implementing low-code automation solutions. Ignyte is certified as a **Small Business** by the Small Business Administration (SBA). Founded in 2014, Ignyte serves a wide range of clients across commercial industry and the government to deliver award-winning cloud-based technology solutions that automate healthcare operations and improve patient experience. We bring extensive government agency experience from supporting the Food and Drug Administration (FDA), National Institutes of Health (NIH), and the U.S. Department of Veterans Affairs, as well as the development of our award-winning solutions implemented for mission driven public health organizations. Ignyte provides full support throughout the product lifecycle to ensure our solution aligns to your needs.

**Team Ignyte Key Facts**

- Specialized in providing end-to-end low-code CMS/IMS automated solutions
- Certified as Small Disadvantaged Business by the SBA
- Partnered with Appian, award-winning case management platform, recognized as market leader by Gartner and Forrester
- Award-winning provider of cloud-based solutions for Government agencies

Figure 1: Ignyte Key Facts

**Appian in the Public Sector**

- 40+ Government agencies
- 100+ Public Sector customers
- FedRAMP certified
- FISMA compliant

Figure 2: Appian in the Public Sector

To tackle the unique challenges facing the Bureau for Medical Services (BMS), Team Ignyte will be partnering with **Appian Corporation (Appian)**, the recognized leader in low-code process automation and application delivery by trusted sources, including Gartner and Forrester. Appian, headquartered in Tysons, Virginia, is trusted by more than **40 US Government Agencies** and more than **100 Public**

**Sector** customers worldwide, including the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services, the U.S. Department of State, and the U.S. Department of Defense.

Appian's secure (FedRAMP-certified and FISMA-compliant), reliable (99.95% availability), and scalable (supporting more than 1.5 billion transactions per day) platform enables these customers to rapidly create, deploy, and use software applications tailored to their unique business needs. Appian solutions can be configured over 20 times faster than traditional software development providing flexibility and adaptability to changing customer needs. Appian's reporting functionality can easily be integrated with supporting technologies, such as Twilio for SMS text messaging and Office 365 to integrate with existing documents and knowledge resources. This means clients won't incur the technical debt and long-term maintenance costs that often accompany pre-packaged configurable off the shelf (COTS) applications. Additionally, Appian's platform natively conforms to all 508 Compliance standards and guidelines.

**Appian Key Advantages**

- Tailorable Forms and Workflows
- Fully HIPAA Compliant
- Low Code API Integration
- Secure, Scalable Cloud Environment
- Mobile Ready Out-of-the-Box

Figure 3: Appian Platform

### Our Team Capabilities

Our combined team possess the key capabilities necessary to design and deliver a case management system (CMS)/incident management system (IMS) solution that can meet BMS' current and future needs. Ignyte's team of seasoned Appian consultants leverage their experience

and knowledge of best practices to not only deliver a new system that meets requirements, but also design streamlined, optimized processes around the system for support. Below are some of our team's highlighted key capabilities that we'll use to deliver the most value to the BMS.

### ***Appian Platform Key Capabilities***

Appian's low-code platform is designed for building highly automated enterprise-scale applications with a focus on time to value. Appian simplifies configuration management with intuitive user design and reusable components, so you can build and modify robust apps quickly. Appian is a complementary software platform to common industry CMS/IMS systems. Appian case management changes the way businesses work by helping clients gain visibility and control over complex case processes to achieve better outcomes faster. Appian simplifies task assignments, health record management, and data validations by integrating data from numerous sources (including EHR) to share information faster and streamline your operations.

### ***Ignyte Key Capabilities***

Ignyte will leverage the Appian platform's robust capabilities to engineer and implement the content management system designed to meet your current and future requirements.



**Figure 4: Ignyte Relevant Capabilities and Keys to Success**

As shown in **Figure 4**, our full-service approach goes beyond simply developing software. Ignyte's professional consultants thoroughly analyze existing systems and requirements to advise clients on the best ways to reach their goals. Our team of certified Appian professionals deliver best-in-class configuration and testing to ensure functionality and fit for future scalability. We also provide the communications, training, and adoption support to minimize the disruption of system changes. Ignyte will use the following key capabilities to design and implement a modernized CMS/IMS solution tailored to BMS' specific needs:

**Business Analysis and Process Engineering** – Our team carefully analyzes current systems to make recommendations for optimization and develop strategies to meet user needs and ensure an effective transition of current system and document processes.

**Best-in-class Tech Configuration and Testing** – We will rapidly configure the modernized system's forms, workflows, business rules, and underlying data structures based on BMS' specific requirements. We'll then continually test our configurations to optimize and refine the modernized CMS/IMS tool where applicable.

**Organizational Change Management and Consulting** – We'll keep stakeholders informed on upcoming changes and their impact by sending announcements, holding informative meetings, and organizing workshops. Our team of experts will be there to help users navigate new features, build excitement, and mitigate resistance to change.

Drawing on our proven methodology and extensive knowledge of the Appian platform, Ignyte will help define your strategic goals, organize actionable insights, and create a high-quality and easy-to-use modernized CMS/IMS solution that will deliver the most value to the BMS.



## OUR RFI RESPONSES

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As detailed in this section, our existing portfolio of solutions provides all the capabilities that BMS is seeking. Armed with our award-winning Appian-based healthcare support solutions and our team of knowledgeable developers, we can tailor our solutions to integrate with any platform or data type that BMS is seeking. Our team is prepared to rapidly design, develop, and implement an effective CMS/IMS solution to support the management of the State's medical assistance coverage and utilization policies for its 1915(c) waiver programs, State Plan Personal Care program, and nursing home transition programs. Below we have provided our responses to your RFI questions.

### **4.2.1 Please describe your CMS and/or IMS solution functionality, including:**

Ignyte's existing portfolio of case management and incident management solutions provides all the capabilities that BMS is seeking. Armed with our award-winning Appian-based healthcare support solutions and our team of knowledgeable developers, we can tailor our flexible and adaptable solutions to integrate with any platform or data type that BMS is seeking. Appian allows you to quickly collect and organize more data, and our innovative team will help quickly transform that complex data into organized, meaningful information.

Our solutions have been implemented in organizations to help monitor member health, automatically verify critical health documents; seamlessly integrate with external information databases and health records; provide training on health safety policies and procedures; search for caregivers and health facilities; schedule in-person or virtual appointments; and report health or safety issues. Additional functionality includes intake, assessment, and reassessment; care planning and service authorization; service delivery and payment; case closure; and dynamic reporting. Our portfolio of solutions can be leveraged for support in other business areas as well, including fraud, waste, and abuse detection.

Team Ignyte recognizes that BMS is seeking a vendor that can bring innovation, collaboration, and technology advancements at a faster pace. We are excited to propose a modern and innovative solution that will meet the requirements for the BMS' future-state CMS/IMS. This project would be delivered using the agile methodology and working closely with BMS product owners during the discovery and development sprints and demonstrate the product increments as they are being developed and tested. This would allow BMS to validate the software as it is being developed rather than wait until User Acceptance Testing.

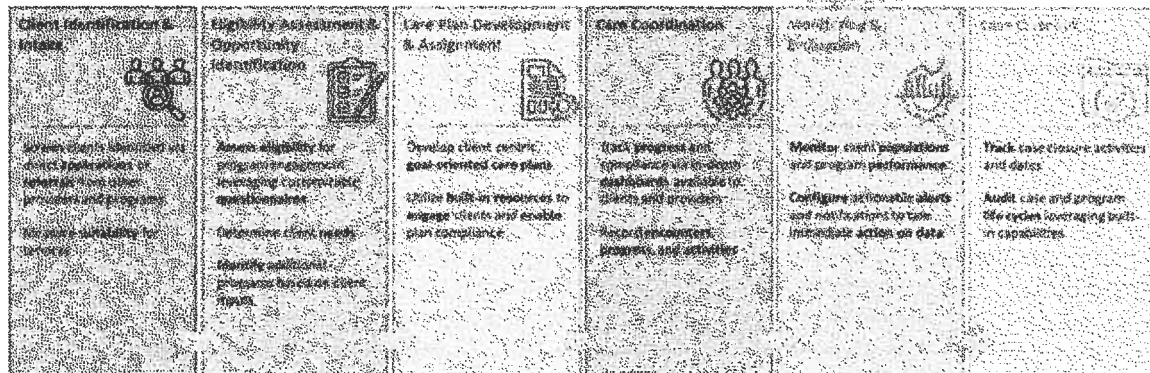
Our professional team of consultants have led numerous complex efforts that have resulted in streamlined processes to support Appian solutions. In addition to providing full support around the design, configuration, and change management of implementing a new system, but we also leverage our experience to provide guidance on how to best manage the processes and workflows surrounding the system. We replace manual, paper-

driven processes with automated functionality to digitally transform operations, reduce instances of error, and save valuable time. We use our knowledge of Appian's industry-leading technology coupled with industry best practices to help our clients achieve greater efficiency and effectiveness in their healthcare-related programs.

Below we have provided additional information on the functionality of our existing Appian-based solutions.

**a. What modules are available?**

As further described below, our developed solution currently includes each of the modules mentioned in the RFI. Our proposed solution also comes equipped with additional modules to further enable the modernized CMS/IMS solution for BMS, including Intelligent Document Processing (IDP) using native AI to quickly and accurately extract data from documents and forms; Robotic Process Automation (RPA) to further automate manual and repetitive tasks, either on their own or as part of a larger end-to-end business process; and process mining used to automatically analyze the current and future state case management process to identify bottlenecks and drive continuous improvement. **Figure 5** illustrates a high-level workflow from intake of new clients through case closeout.



**Figure 5: Patient Screening for Program Eligibility**

Our solution is based on the Case Management Society of America's (CMSA) standards and best practices for case management systems, and it comes pre-loaded with program templates that can be tailored to meet HCBS waiver program requirements. However, administrative users can manage all program types in the system including what fields are related to each program, the requiredness of those fields, funding sources, and documents related to the program. In addition, multiple programs can be added to a single case.

Additionally, our IMS solution includes modules for the intake, triage, resolution, and closure of incidents. This includes the ability to promote incidents to problems (i.e.,



known incidents) to feed the collective body of knowledge about the problem. Our IMS solution provides a single-pane view for agents to access all info needed to resolve the incident from a single place. The priority management functionality also helps managers and agents identify which incidents to tackle first based on priority and severity.

**b. *What features are standard? What features are available at an additional cost?***

We design and tailor solutions using only the programs deemed necessary to fully satisfy the needs of our clients. The Appian platform is available on an all-inclusive basis including all features, or different features can be purchased a la carte. Among the extensive standard features included in Appian's core are workflow automation and IDP. Additional a la carte features include RPA, process mining, and Appian Portals. Our quoted Appian license cost below includes all Appian's workflow automation capabilities, IDP, RPA, process mining, and Appian portals. Ignyte is prepared to work alongside BMS to determine the optimal pricing model based on their unique needs.

Our proposed solution would sit on top of the Appian platform for a flat rate to provide all case management capabilities as specified in the RFI. Please see our response to 4.2.12.a for additional details.

**c. *Please describe how your solutions facilitate each stage in the HCBS Continuum of Care, including:***

**i. *Intake***

Our solution allows for intake both through an external portal as well as an internal process for authorized users. Clients can self-apply or be referred by another caregiver or program. Our solution also supports intake both through an external referral portal, as well as an internal process for authorized users. By allowing for single case files to have multiple program enrollments at any given time, our solution ensures that patients can receive the care they need and administrators can easily track what services are being rendered.

Intakes and assessments are handled as electronic forms in addition to allowing for supplemental attachments to be provided. Additionally, intake and assessments information can be generated into a downloadable Excel file or sharable/printable PDF.

Furthermore, if BMS requires the scanning of paper or pre-filled PDF forms to support intake and assessment processes, Appian's powerful "Intelligent Document Processing" allows our solution to automatically ingest the data from these files so it can be used immediately in the digital case files and client records.

**ii. *Screening***

Provider location is tracked for client assignments during intake, and clients are able to access our secure patient portal to check their intake status and receive notifications regarding status changes. As shown in **Figure 6**, each program is

configured with an eligibility checklist, which are used by case managers for verification.



**Figure 6: Eligibility Determinations**

After communicating with a client and reviewing for eligibility, the case manager can make an informed decision. Patients can be screened and potentially enrolled in multiple programs at a time. Each screening process happens independent of others.

### **iii. Assessment**

#### **A. What is your approach for supporting assessments, which may vary by populations served under Medicaid HCBS Waivers?**

Our solution analyzes all patient assessment information collected and identifies and escalates at-risk cases to the necessary caregivers.

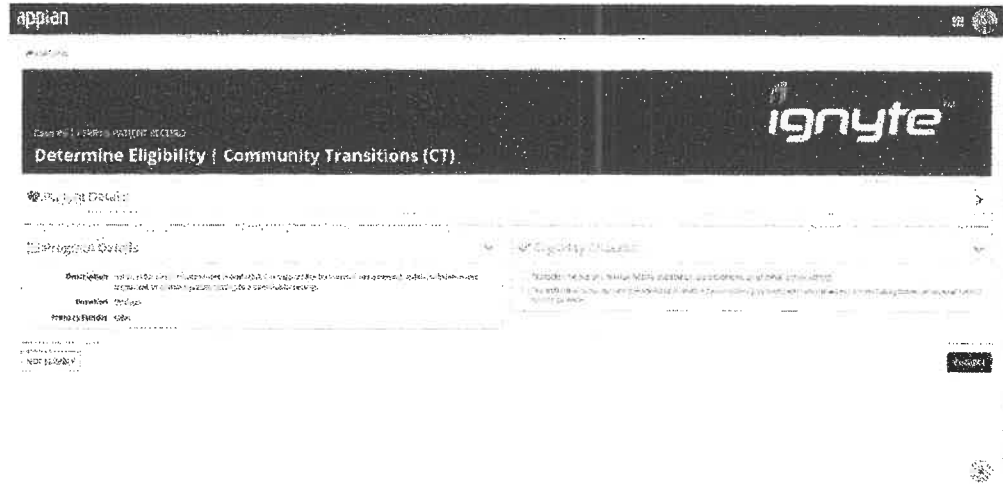
Our solution has various standard behavioral health assessments available out of the box (e.g., NIH PROMIS and K-10). However, the solution can be pre-loaded with additional standard assessments required by BMS, and it allows for BMS users to create additional assessments through a wizard-guided user interface (no coding required).

#### **B. Does your solution support gathering of assessment information on mobile devices? Please explain.**

Yes. Our solution allows for user-generated and pre-loaded assessments to be sent to clients and completed via the mobile portal.

### **iv. Clinical eligibility determination**

Our solution includes dynamic and tailorable business rules and workflows for program-specific eligibility, which can easily be configured using Appian's low-code drag-and-drop API wizards. Each program is configured with an eligibility checklist, which are used by case managers for verification as shown in **Figure 7**.



**Figure 7: Patient Program Eligibility**

After communicating with a client and reviewing for eligibility, the case manager can make an informed decision.

Patients can be screened and potentially enrolled in multiple programs at a time. Each screening process happens independent of others.

**v. Enrollment**

Our solution automates member enrollment across programs to give your clients a leg up on owning their healthcare journey. The solution also offers full visibility into the status of member enrollment and onboarding, from quote, to ID card, to premium billing status.

**vi. Care Planning**

Our solution is pre-configured with the key capabilities that BMS is seeking to improve caregivers' ability to take action and develop targeted care plans based on the data collected. The flexibility of the Appian platform will enable Team Ignyte to rapidly adapt this solution to BMS' specific requirements up to 20x faster than traditional custom development, and without the downstream risks to future enhancements associated with COTs packages.

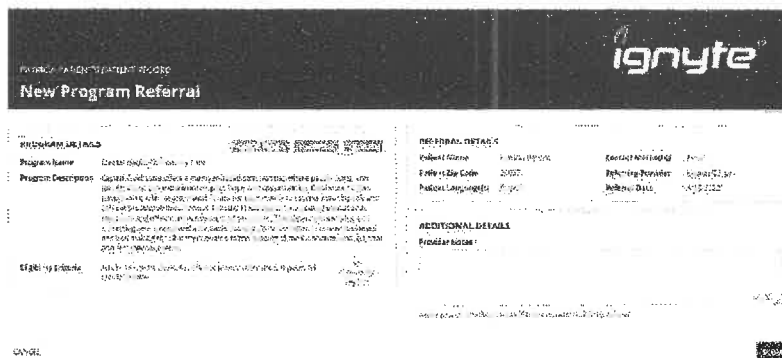
We will work closely with BMS to create tailored end-to-end workflows for establishing accountability throughout the care planning process. Our solution allows for easy organization and sharing of patient care activities and information.

Our team of experienced consultants will help BMS configure channels of communication that will provide the most effective care to BMS patients. Our solution allows BMS to quickly assess patient needs and goals and create proactive care plans. Providers will have improved access to monitor and respond to patient needs faster.

Our solution will also support patients' self-management goals by empowering them to take action in their health journey. The solution provides patients quick access to community resources, and it allows providers to better align their resources with patient and population needs.

**vii. Service Authorization**

Our solution streamlines the referral process to quickly connect providers and patients. Our cloud-based solution will give providers full visibility over their referrals and service authorizations for procedures. Patients can monitor their referral status from their patient portal, and providers can accelerate the process of getting their patients the help they need. Providers can create new program referrals directly from the portal as shown in Figure 8.



**Figure 8: Provider New Program Referral**

**viii. Service Delivery**

Our proposed solution contains rich reporting capabilities that provide everything from high-level system performance metrics to fine-grained customizable reports on all the data in the system. These analytics are used to drive better understanding of the claimant population and their needs to improve service delivery. Appian's "future proof" platform continuously provides new innovations and features to improve reporting functionality. We can configure individual reports for case managers and supervisors to report on any metrics where data is available. The reports are compiled and summarized on a dashboard to gain

further insights into available data to support the increased efficiency and capacity of the BMS' Home and Community-Based Services (HCBS) waiver programs.

**ix. Billing/Claiming**

Our solutions have the capability to track international classification of diseases (ICD-10) and common procedural terminology codes (CPT) that aid in coding for medical billing.

We can integrate with payer Electronic Data Interchange (EDI 5010) and corresponding Web based APIs for common transactions for checking benefits eligibility (270/271), submitting claims (837), and claim status (276/277).

**x. Reassessments**

Our proposed solution provides BMS with the capabilities to efficiently and seamlessly handle reassessment processes to verify which members of the patient population still qualify for Medicaid benefits. Appian's out-of-the-box processing functionality allows for configuration of BMS business processes associated with determining reassessment eligibility. Processes can be run on a given schedule and assigned to a designated user and/or group to validate the results. Robust reporting features allow for visual indicate of patient progress through the reassessment process.








**xi. Re-enrollment**

To track re-enrollment processes across the entire patient population, BMS needs a software solution that can scale to manage each request. Appian's out-of-the-box features for reporting, record tracking, and integrations allows for the creation of a streamlined solution aimed at better tracking the status of re-enrollments. Intake of the request through final decision can be mapped using the visual, BPMN-complaint process designer.

Provider facing portals can be configured to efficiently manage the requests for re-enrollment if a current system is not used. In the case that a provider enrollment portal already exists, the data can be integrated to the Appian solution via standard API connections.

**xii. Quality Assurance**

Team IgnYTE believes most of BMS' requirements for this effort will be met with Appian's out-of-the-box functionality. For requirements that are not met out-of-the-box, we will create comprehensive Build and Testing plans. Our testing and quality assurance process is a comprehensive approach that confirms that the application fully meets all requirements, functions as expected, and is intuitive for system end users. All system testing will be subject to BMS approval, and Team IgnYTE will create comprehensive documentation for all tests performed. An overview of our testing and quality assurance is outlined in **Figure 9**.

Team <b>Ignyte</b> Testing and Quality Assurance Process	
 <b>Unit Testing</b>	Tests individual components of software to validate basic functionality and enable rapid development.
 <b>Integration Testing</b>	Grouped testing of units for a real-life scenario to observe interactions between integrated units and expose defects.
 <b>User Acceptance Testing</b>	BMS end-users validate system functionality with structured and unstructured testing.
 <b>Security &amp; Vulnerability Testing</b>	All software components are tested to identify and mitigate potential security threats and vulnerabilities in the environment.
 <b>Accessibility &amp; Usability Testing (508 Compliance)</b>	Measures the ease in which users can complete common tasks in the system, including users with disabilities.
 <b>Release Dry Run</b>	A pilot test performed by a select group of users that confirms the major components of the system are functioning properly.
 <b>Post Release Validation</b>	Verifies that functionality is working properly in the production environment. Any bugs are documented and resolved.

**Figure 9: Testing and Quality Assurance Process**

Our team will begin with **unit testing** to verify each individual software component. Team Ignite will isolate each part of the solution and perform tests to demonstrate that each individual component fulfills the requirements and desired functionality. These tests will help our team identify system defects as early as possible, minimizing future risks as we continue moving forward with solution development.

Upon successful completion of unit testing, Team Ignite will move onto **integration testing**. Integration testing utilizes a real-life business scenario to verify that a combination of different system components works correctly together and collectively meet the functional requirements of the system. Our team uses a bottom-up approach to integration and functional testing by first testing higher-level combinations and requirements of system components before moving on to more complex scenarios. Each series of integration tests will incorporate additional complexity and functionality to validate that system components are working together properly. Each integration test scenario will address a specific business scenario so that testing addresses real-life situations that will be processed on the live system.

Upon completion of unit and integration tests, system functionality will be available to BMS end-users for **User Acceptance Testing**. This series of tests will provide BMS users with direct access to developed functionality for hands-on testing. User Acceptance Testing will consist of structured and unstructured testing. Structured testing will have traditional test scripts to process core business scenarios. Unstructured testing will have users utilize the system without traditional test scripts or oversight. These tests will enable users to process fringe scenarios and edge cases that may not be covered in scripted tests, and confirm all required functionality is addressed in the system.



Team Ignyte will then begin **security and vulnerability testing**. During this phase, all components of the software are tested to identify and quantify potential security threats and vulnerabilities in the environment. If potential weaknesses are identified, Team Ignyte will notify BMS leadership and develop a mitigation strategy to either remove the potential threats or reduce the risk level.

Once this series of testing has been completed, Team Ignyte will begin **accessibility and usability testing**. This round of tests will measure the ease in which users can complete common tasks in the system, including users with disabilities. Team Ignyte will test for general technical compliance as well as accessibility with 508 Compliance standards and guidelines to focus on the overall usability of the new system. These tests will enable us to prioritize recommendations that focus on the most critical aspects with an overall goal to improve the user experience for all user types. During this phase of testing, our team will also measure the system's responsiveness, stability, scalability, reliability, and speed to confirm that it is operating smoothly within the operating environment.

Team Ignyte will then move onto **regression testing**, which includes both automated and manual testing methods. Regression testing is inherent to our development sprints. As new requirements and functionality are incorporated in each sprint, regression testing confirms that existing functionality is not impacted, and that key integration points with new and existing functionality function as expected. These tests utilize automated testing tools (such as Cucumber and FitNesse) to automatically test existing functionality and core scenarios. This streamlines the testing process and catalyzes higher-value testing activities, such as the integration points between new and existing functionalities. From our understanding of BMS' stated requirements in the RFI, there is no automated testing tool currently in-use, however if BMS has a preferred automated testing solution, we will partner with BMS leadership to incorporate it into our solution.

Prior to each deployment or release of new functionality, Team Ignyte will perform a **release dry run**. Our team will perform an in-depth test in a staging environment that is configured exactly as production will be. This will verify that the major components of the system are functioning properly before going into production. For the release dry run, we will select a group of end users to test the system to confirm that everything is functioning properly and provide any feedback. The deployment teams will be responsible for resolving any defects identified during the regression and release dry run cycles.

Once the solution has been deployed to the production environment, Team Ignyte will perform a **post release validation** to verify the readiness of the production environment. This will include the validation of deployed functionality, as well as all data loaded to the production environment. Deployment checks are supported by Appian Health Check. Appian Health Check provides automated application

monitoring to automatically detect platform issues and inefficiencies. Additionally, our team will perform a series of tests to confirm that all functionality is working as it was in the test environment. For all issues detected, we will trace the root cause, identify the appropriate correction procedures, and record our findings in a Release Validation Report that will be shared with BMS leadership.

**d. Please describe your standard reporting features. Can users create their own custom reports? How does your solution support measuring outcomes?**

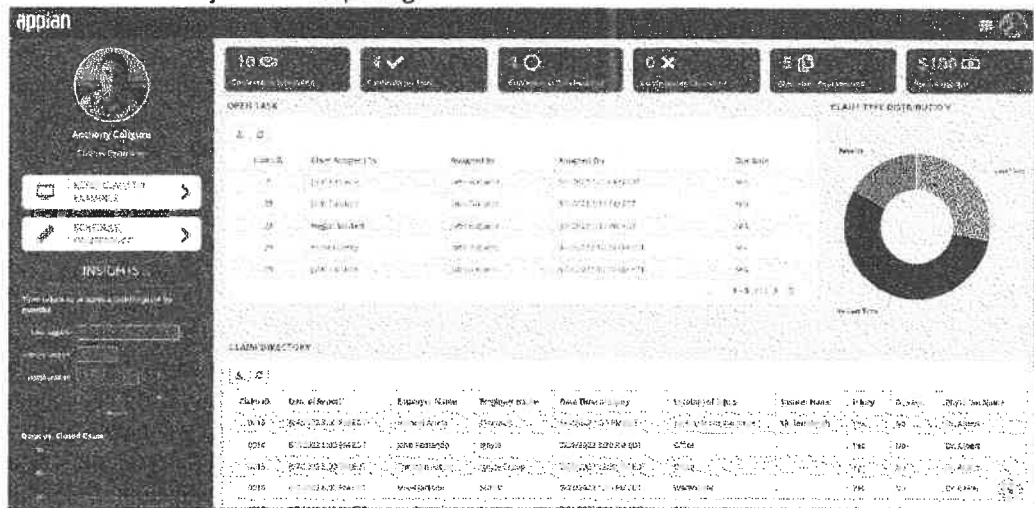
Our solution contains rich reporting capabilities that provide everything from high-level system performance metrics to fine-grained customizable reports on all the data in the system. Appian's Data Anywhere architecture allows you to integrate data from numerous internal and external sources to provide a single pane of data right at your fingertips. Appian's data analytics will drive a better understanding of BMS users and their needs to help improve service delivery and uncover new opportunities for improvement. In addition to Appian's robust out-of-the-box reporting capabilities shown in **Figure 10**, our experienced team will configure dashboard reporting that is aligned to BMS' data requirements, branding, and ever-evolving needs.



**Figure 10: Appian's Out-of-the-box Reporting Capabilities**

Appian's "future proof" platform continuously provides new innovations and features to improve reporting functionality. We will configure individual reports for BMS users to report on any metrics where data is available. The reports are compiled and summarized on data-rich dashboards to gain faster insights into claims statuses, performance measurement, and overall compliance. **Our team will rapidly implement new dashboards and reports in the future using Appian's drag-and-drop capabilities, unlike new dashboards created on other COTS solutions, which typically take weeks or months.**

By unifying enterprise data in a single, searchable environment, Appian provides a comprehensive view of a claims, products, organizational assets, and other critical information. Rich reporting dashboards are mobile-ready and capture detailed performance metrics, providing valuable insight and analytics, which foster business process optimization. Appian's industry-leading dashboards and reporting capabilities are inherently more actionable because of their ability to link the most activities, data, and workflows. For example, a case manager can enter the system to view data-rich dashboards like the sample shown in **Figure 11**, as well as receive alerts or notifications to any cases requiring attention.



**Figure 11: Sample Claims Clerk Dashboard**

From this dashboard, they have a clear view of all assigned open claims with due dates. Managers will have access to relevant claim data metrics and regular reporting, and users can also run new ad-hoc reports as required. Additionally, users can take quick actions directly from their dashboard, such as new claim referrals to examiners and scheduling conferences. As shown in the sample above, the user dashboards include KPIs for the overall claim workload.

As shown in **Figure 12**, users can also drill-down into individual claims records to view detailed case or claim information, see associated records, and take quick actions.

**QUICK ACTIONS**

- Request Originals/Retrieval
- Approval/Rejection of Standard Attorney Fees
- Approval for Attorney Fees

**EMPLOYEE INFORMATION**

Employee Name	SSS	Employer Id Number	Insurer Id Number
Employee SSN	XXXXXXXXXX	Employer Name	Insurer Name
Employee Address	TEST	Employer Address	Insurer Address

**ASSIGNED EXAMINERS**

Jason Pagan	Megan Marshall
Insurance Examiner	Claims Examiner

**INFORMAL CONFERENCE CHECKLIST**

- Complete Pre-Conference Worksheet
- Conduct Pre-Conference Call
- Conduct Informal Conference
- File Memorandum of Informal Conference
- Generate/Email Memorandum Package (Certificate of Service & Appeals Rights Document)

**STIPULATION/SETTLEMENT CHECKLIST**

- Resolve (win/lose) prior to attorney fee approval
- Sign Pro-Se Affidavit
- Verify required documents
- Generate Approval/Rejection Letter with Certificate of Service

**CLAIM INFORMATION**

Claim #	78	Location of Injury	Office
Date Of Report	August 8, 2022 6:06 PM	Description Of Injury	Upper
Date Time Of Injury	August 8, 2022 6:07 PM	Injury	Yes
Physician Name	SSS	Disease	No

**ASSOCIATED CLAIMS**

Claim Number	Claimant	Date Reported
7	Marion Pagan	11/12/2021
12	Caroline Pagan	11/12/2021
13	Thomas Pagan	11/12/2021
14	John Pagan	11/12/2021
15	John Pagan	11/12/2021
16	John Pagan	11/12/2021

**CLAIM PROGRESS**

- Claim Filed

Figure 12: Claim Record Detail

**e. What type of on-screen user help is included?**

As part of our full-service approach, Team Ignyte will develop several online training materials for BMS staff, including module-based training videos and an online searchable Knowledge Center with self-help user quick reference guides. BMS' technical team can further configure our solution to meet further needs or integrate with additional systems with the help of Appian's rich suite of drag-and-drop guided wizards.

Our patient portal includes a chatbot available to answer questions and help users navigate through the portal to find the information they need. The portal was designed to save providers time by putting all available resources and information at the patients' fingertips. It also alleviates healthcare providers by freeing up resources that would typically be used toward manually sending reminders, calling patients, and fielding questions that can easily be answered via the portal.

**f. Please provide your support structure (e.g., hours of operation, methodology including email, support, online ticketing system, etc.)**

Prior to go-live, Team Ignyte will work with BMS to prepare a maintenance plan and support plan. The maintenance will contain the escalation path for system issues, including system performance, and data accuracy. Team Ignyte will provide hands-on user support and identify opportunities for solution improvement. Where relevant, we will utilize customer satisfaction surveys to receive direct feedback from solution end users and proactively identify enhancement opportunities. Our maintenance plan will

include our methodology to triage, prioritize, and implement these improvements, as well as mandatory platform updates. Using Appian's single-code base, all platform updates will be applied across all desktop browsers, mobile, and tablet views by default. Additionally, the Appian platform can enable a DevOps support environment for the Continuous Integration and Continuous Delivery of incremental system improvements to improve system stability. The maintenance plan will also describe our approach monitoring overall system health, including interaction with integrated systems such as the financial system of record and external bank databases.

Team Ignyte can also provide support services for the rollout and deployment of new enhancements. Following our configuration and change management strategy, we will work with BMS to ensure users understand, feel comfortable, and are supported with any new enhancements that will be deployed on the platform.

The Application will also be backed by Appian's Premier Cloud Platform Support, providing BMS with 24/7/365 continuous monitoring, and help desk support to enable service request tracking, categorization, escalation, and reporting. This includes escalation tiers for both basic requests (tier 1) and specialized technical support (tier 2). Additionally, we will notify BMS of any planned outages at least 48-hours in advance, with accommodation for BMS requests for postponement. We will notify BMS of any unplanned outages within 1 hour of report for service disruption, and within four (4) hours for service degradations. The Service Level Agreements (SLAs) and all related procedures will be provided to BMS within two (2) weeks of contract award.

**4.2.2 Please describe your CMS and/or IMS solution configurability, including:**

**a. Is your CMS and/or IMS designed for any particular client, business, or program contexts? Please describe.**

Our highly adaptable solution has been successfully implemented at state agencies and federal organizations to support healthcare case management workflows. This includes special configurations and considerations for the protection of PHI and PII, adherence to local and federal regulations, and consideration for users with special needs.

Ignyte tailors each solution to fit the unique needs of our clients and dramatically improve business results. Our CMS solutions are based on the standards set by the Case Management Society of America (CMSA), which provides guidance in the practice of case management in ever-changing and challenging healthcare environments. Our IMS solutions are built with priority in mind to support the rapid reporting, investigation, and tracking of incidents in a single-pane view, so that incident managers can make informed decisions quickly.

Our team has achieved great success implementing our solutions to improve operations for healthcare and human service organizations, as well as state and federal government agencies. As the recognized Customers' Choice for Enterprise Low-Code Application Platforms by Gartner, Appian can rapidly be configured and

customized to overcome the most complex business challenges and maximize your organization's resources.

**b. *If your solution is not designed specifically for Medicaid HCBS waivers, what configurations and customizations are needed to adapt the product for use by State Medicaid HCBS waiver programs?***

Our solution was configured for a home-based community services organization with the mission of empowering people with the resources they need to thrive, and to live the lives they envision in their communities of choice. Because the solution was based on Appian's industry-leading platform, we were able to quickly tailor a working solution in weeks to help track, monitor, and measure patient outcomes.

Ignyte led the planning, analysis, and implementation of the solution to automate workflows to manage the end-to-end case lifecycle, client and provider correspondence, and supporting documents. Our team also delivered internal and external portals to manage cases and claims reimbursements and included integration with other enterprise systems such as finance, billing, and human resources.

Ignyte played an integral role in designing a system capable to meet our client's unique requirements and improve usability by limiting complexity and not overwhelming users with functionality they didn't need to perform their duties. As they were a healthcare organization, security and compliance were of the utmost importance. As such, Ignyte leveraged the highly secure, scalable, and HIPAA-compliant Appian Platform that already met or exceeded the Security Assessment and Authorization requirements of the client's many partners and stakeholder groups, including State and Local Government agencies, and other funding organizations. Ignyte established a highly effective Agile DevSecOps delivery model that delivers new capabilities required to modernize the client's care delivery while concurrently supporting and enhancing the previously capabilities delivered over the past year.

Based on our experience completing projects that are similar in nature to BMS' stated requirements, we are confident that our solution can quickly be configured to meet your user needs and rapidly deliver incremental value to BMS' HCBS waiver programs.

**c. *Can any aspects of your system be configured by an appropriately trained state user? If so, please provide some specific examples, preferably from a real implementation scenario.***

Appian is the go-to choice for high value with ease-of-development, business-oriented architecture, document management and other enterprise needs. Ignyte has worked with a number of clients to train their designated users to maintain and enhance the initial solution leveraging the visual design tools and drag-and-drop capabilities within the Appian Platform.

Ignyte partnered with ACIST Medical, a medical device manufacturer, to enable their small team of developers to rapidly develop applications on the platform. In the span



of 8 months, the team was able to learn all aspects of the platform and push out 5 production-grade applications for their internal use.

While our solution will be tailored to specified user requirements, our full-service approach will also give users the tools they need to succeed and further configure the platform based on BMS' evolving needs. Another example of this is our CMS work with Henry Crown & Co, in which our team put together instructional guides for Crown's trained users. These guides served as a reference to provide step-by-step instructions to Crown's technical users on how to update reference values in the database, as well as make other configurations to adapt to their changing business rules over time.

**d. *What are some of the more challenging use cases to configure? What are some examples of use cases that require customization?***

The flexibility and power of Appian has empowered our customers to find solutions to meet their biggest and most complex challenges. To be truly successful, the solution described in this RFI must be backed by a commitment from the platform vendor to the success of the program over the long term. No list of technical features completely removes program performance risk. Therefore, the BMS should consider aspects of the company from which it is buying: its leadership team; its demonstrated commitment to the federal market; and ultimately, its dedication to customer success. These pieces must come together in a collaborative way for the CMS/IMS solution to succeed.

Our team recognizes that healthcare use cases can be challenging due to the strict rules around accessing and processing patient data, PHI, and PII, and the Appian platform provides excellent built-in guardrails around the handling of such data. To ensure success, BMS should select a partner that understands the needs and requirements specific to healthcare.

Appian is 100% HIPAA-compliant and has the highest level of HITRUST certification for protecting PHI for any data (encrypted and) stored on the cloud. Please visit <https://appian.com/why-appian/trust/compliance.html> to learn more.

Additionally, Appian's "Data Anywhere" architecture will enable BMS flexibility to treat an existing secure data store as the source of truth if for some reason our secure HIPAA-compliant application database is not preferred. Appian's flexible, granular security controls protect access to PII and other sensitive information. Appian also supports extensive secure and scalable data synchronization of up to 100,000 rows of data at a time which can be used to improve overall system performance and prevent a "chatty" interface with BMS' EHRs or other downstream systems.

Part of the work we did for Rocky Mountain Human Services (RMHS) is a great example of this. To become a more efficient human services agency and serve their users more effectively, RMHS sought a modernized claims system that would really follow the processes that they were doing and allow the flexibility needed to adapt to those processes. Integration was another key driver, as the system needed to integrate with a variety of local state and Federal systems.

To ensure delivery of a solution that was coded properly, Team IgnYTE first implemented a framework to determine RMHS' specific eligibility rules. After carefully looking into RMHS' existing systems and processes, IgnYTE tailored a CMS solution on the Appian platform that provided full transparency into all their operations, including claims intake, clinical eligibility determinations, enrollment, care plans, and billing. One of the key operations they wanted to address was billing, and our system provided all necessary clarifications directly in the tool to accelerate reconciliations. Before implementing our solution, RMHS relied on data spread across several different access databases and emails to try to reconcile billing information. Our solution provided all necessary information right in the application to streamline operations, immediately flag any billing errors, automate the processing of approximately 1,000 referrals per month, and reduce RMHS' revenue cycle timelines by more than 15%.

**4.2.3 Please describe how your system manages user access to member data. Different user types will need different levels of access. Please also describe how your system allows for member transfers from one CMA or service provider to another CMA or service provider, and how it manages user data access when a member is transferred.**

Our solution is based on Appian's Data Anywhere architecture and low-code integration capabilities. These capabilities enable Team IgnYTE to configure seamless integrations with any existing BMS systems and databases through a rich suite of drag and drop guided wizards for standards-based integration via Open Database Connectivity (ODBC) or Application Programable Interfaces (APIs).

To comply with HIPAA regulations, we recognize that users should only have access to records they have been granted permission to see. Our solution utilizes role-based access control by default to control user types and permissions. Our granular access control model enables us to configure permissions and access rights at a data, process, and document level to reflect BMS' security standards. The implemented controls will limit availability to application functionality, screens, assigned cases, data records, data elements, and data values where appropriate.

Every record will be assigned to an owner with access granted contingent upon multiple levels of inputs (e.g., CMA or service provider). When a record is transferred from one CMA or service provider to another where they aren't assigned, that CMA or service provider will no longer have permission to manage the data.

**4.2.4 Please describe your CMS and/or IMS implementation experience, including:**

By using the power of low-code to transform and automate key case management processes to meet the dynamic requirements of our clients, Team IgnYTE has successfully developed both public-facing and internal CMS and IMS solutions. Our team brings a long history of audit, enterprise risk management, internal controls, fraud, agile system implementations, human-centered design, and product-oriented solution approaches.

One example of our CMS capabilities is our work with Rocky Mountain Human Services (RMHS). RMHS engaged Ignyte to replace its existing case management and EHR systems, with a new Appian-based Software Platform that improves case management and is easier and less costly for them to maintain on the limited budget of a non-profit. Ignyte led the planning, analysis, and implementation of a solution to automate workflows to manage the end-to-end case lifecycle, client, and provider correspondence, and supporting documents. Our team also delivered internal and external portals to manage cases and claims reimbursements and included integration with other enterprise systems such as finance, billing, and human resources

**a. *How long has the solution been in use?***

Founded in 1999, Appian has been a trusted provider of case management, business process management, and process mining solutions for more than 20 years. Recognized as a market leader by organizations like Gartner and Forrester, Appian is trusted by more than 2,100 clients and 9.9 million users with 10.8 billion transactions per day across their 63 availability zones.

Our healthcare-based case management solution was launched in 2020 and implemented at RMHS in 2021. Since being launched, our solution has provided tremendously beneficial results for RMHS, including the following achievements:

- Reduced revenue cycle timelines by more than 15%
- Automated the processing of ~900-1000 referrals per month, ~150 hours per month
- Protected the PHI and PII of more than 15,000 patients
- Enable caregivers to easily view and manage their assigned patients and individual patient health issues
- Reduced process errors by over 25% by implementing guided checklists
- Replaced over a dozen departmental spreadsheets previously used for tracking program metrics

**b. *How many implementations of your CMS and/or IMS have you conducted? How many of those were for state agency Medicaid HCBS waiver programs?***

Over 95% of the solutions Appian has developed for their more than 500 clients fit in the Case/Incident Management arena. Appian's native components, including Workflow, Document Management Rules, Reporting, and Integration capabilities, are everything that Complex Case Management solutions require. The fact that Appian is an open platform further extends the flexibility to work with and through other solutions, with the goal of Appian being a unifying technology for those complex business processes.

Appian is the case management standard for the federal Centers for Medicare & Medicaid Services (CMS) organization. Appian applications have been implemented to support the Affordable Care Act (ACA) with various modules to add organization

support, including supporting the determination of Medicaid management eligibility and tracking improper payments.

Utilizing Appian in managing ACA enrollments at CMS has seen the reduction of time it takes to process individual exemption applications. The solution provides detailed reports of where applications are in the process and what information or verifications are needed to complete them. The process serves a vital function in the marketplace as not all consumers are required to purchase insurance through the marketplace. Some of these exemptions are income based, which allows a consumer to decline purchasing insurance plans that are equal to a certain share of their income.

**c. *What Medicaid HCBS waiver programs has your solution been used for?***

Although not for specific State Medicaid HCBS use case, Appian is a standard case management solution for the federal agency, Centers for Medicare & Medicaid Services. Specific solutions involve case management and data collection for State Plan Amendment Types, building a CMS that includes eligibility and enrollment for the Affordable Care Act, as well as a system that automates inconsistencies during eligibility determinations for the Affordable Care Act.

**d. *Have you implemented your solution to manage multiple Medicaid HCBS waiver programs? If so, please provide examples.***

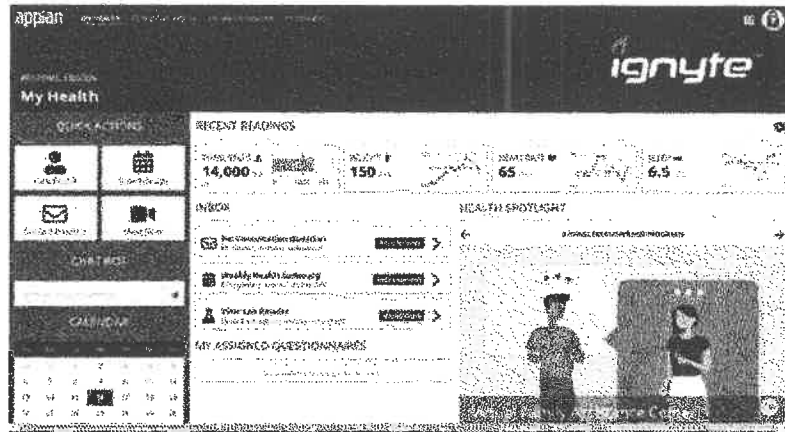
Appian has not specifically been used for Medicaid HCBS waiver programs at the State level. However, our proven solution has all of the available features that BMS is seeking in a modernized CMS/IMS solution.

**e. *Some of West Virginia's waiver programs include a "self-directed care" option. Have any of your implementations included this type of program? Explain how your solution aligns with self-directed care concepts.***

Our solution includes an army of tools to help patients support themselves. For our client, RMHS, our public-facing portals have been used for thousands of referrals since first implemented.

With our solution, patients can log-in to view and manage their health record, schedule appointments, communicate with their caregivers, and use available tools to improve their health. Our solution improves the end-to-end patient engagement lifecycle and integrates a proven bank of NIH PROMIS questionnaires to capture Patient Reported Outcomes, enables remote patient monitoring with connected health devices, enhances Electronic Health Record (EHR) integration with Appian Record Sync (powered by HL7 FHIR standards), provides access to medical ridesharing providers (RoundTrip) and social care networks (Aunt Bertha), as well as the ability integrate patient satisfaction metrics with leading experience management platforms like Qualtrics and Medallia.

Full functionality of the app is available on both desktop and mobile devices. **Figure 13** below shows what patients see upon logging into the patient portal on desktop.



**Figure 13: Desktop View of Appian Patient Portal**

As shown above, patients can quickly view all their historical medical data in a single, elegant dashboard. Our solution also integrates with the Withings suite of IoT connected devices to measure health metrics like heart health and step count, which are uploaded directly from the patients' smart devices and displayed on their portal homepage.

Patients will be empowered to take more control of their health journey by being able to quickly schedule appointments, contact providers, log new health data, view provider communications, and answer assigned patient questionnaires as shown below in **Figure 14**.



**Figure 14: Patient Questionnaires**

Patients requiring transportation assistance can quickly access options for ride share via the portal's integration with Roundtrip. The portal integrates referral processes via the Aunt Bertha Referrals API, which is commonly used in workflows where your users

will identify available programs for a seeker they are helping, create a referral based on a selected program, and then return information about the created referral as it is needed in the seeker's profile within your application. Example referrals include resources for rideshare, mental health, support groups, and community services. The automated referral process includes a built-in satisfaction reporting system to measure overall patient experience as well.

Our patient portal also includes a chatbot available to answer questions and help navigate through the portal to find the information they need. The portal was designed to save providers time by putting all available resources and information at the patients' fingertips. It also alleviates healthcare providers by freeing up resources that would typically be used toward manually sending reminders, calling patients, and fielding questions that can easily be answered via the portal.

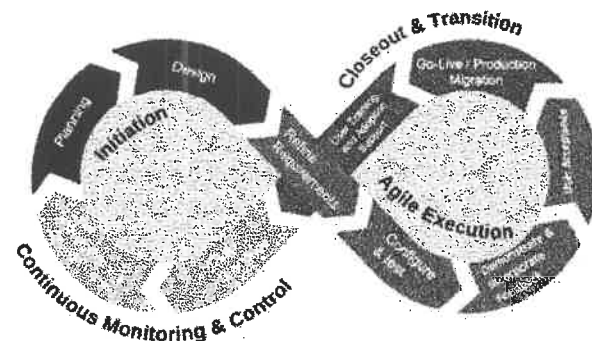
**f. Have states used your system for Money Follows the Person (MFP) programs? If so, explain how your solution aligns with MFP concepts.**

Our developed solution adheres to all of the activities BMS would be tracking for MFP programs, including the following:

- Assessing and determining eligibility for a program
- Case management activities where a client is enrolled, such as logging client notes (different note types have different data - could be tailored for tracking which activities are billable to the MFP program or not), uploading documents, care plans
- Client expense requests, which can also be tailored for tracking what can be reimbursed by MFP programs

**4.2.5 Please describe your typical System Development Life Cycle (SDLC) approach.**

Our approach is based on incremental delivery of software during Iteration cycles with multiple iterations within a given release. Each iteration is based loosely on a waterfall-like System Development Life Cycle (SDLC) that is repeated in subsequent iterations. As such, deliverables submitted during the SDLC may be subject to BMS review and approval but would be 'living' documents that may need to be updated with each subsequent iteration to incorporate lessons learned. Therefore, each item in the Iteration Cycle would be treated as a discrete application of our methodology and include the phases and activities summarized in Figure 15.



**Figure 15: Team Ignyte's Software Development Lifecycle**



NIST 800-218 is a recommendation around mitigating risks in software vulnerabilities by implementing a secure software development framework (SSDF). Appian has implemented a secure software development lifecycle process to ensure that all Appian-based applications are secure. Our secure software development lifecycle is independently assessed in many of our compliance certifications such as SOC, FedRAMP, PCI-DSS, and ISO 27001. From a partner perspective, it's important to note that any customization of the Appian cloud should also follow a secure software development lifecycle process to ensure that code is tested and secure before releases.

Prior to the initiation of our iterative approach for the development and implementation of the CMS/IMS tool, our team will develop and provide detailed plans for execution to BMS' Strategy & Risk Management team for approval. These plans include our *implementation approach and methodology* and key components, disaster recovery, *migration strategy, and approach for the decommissioning legacy systems*. The activities to execute these plans will be included in future iteration cycles.

**4.2.6 Please describe your solution's hosting environment, levels of service, and alignment with federal standards for privacy, security, and hosting. Are any browser add-ons or plug-ins required for end users?**

Our solution is hosted on the secure and scalable Appian Cloud. The Appian Cloud environment is accessible both through the internet via an HTTPS connection as well as the State's private network. Our solution complies with health licensing standards, HIPAA, PII, PHI, and BMS Cyber Security Requirements. All information collected or processed by the system is encrypted at rest and in transit.

Appian provides leading edge security for authentication. Use of Appian, LDAP, or SAML authentication will ensure users can access Appian from any remote devices, while requiring necessary credentials to protect the integrity of the data and information stored. More information can be found at <https://docs.appian.com/suite/help/20.2/Authentication.html>. BMS will also benefit from Appian's electronic signature functionality. Remote patients and providers will be able to sign documents electronically or upload a signed document.

Our solution is 100% browser-based and does not require any application installation. The Appian platform is supported on all browsers.

**4.2.7 What is your experience implementing your CMS and/or IMS in a modular MES environment?**

- a. **Has your solution been implemented in a context that requires Centers for Medicare and Medicaid Services certification? If so, was certification obtained? If not, why?**

We are unable to disclose this client information without a signed NDA.

**b. *If not, are there any known obstacles or risks to implementing your CMS and/or IMS in a modular MES environment that will require Centers for Medicare and Medicaid Services Certification?***

No, there are no known obstacles or risks. Appian excels at building modular systems that can rapidly be configured and adapted to a multitude of varying client needs and data environment requirements. Modules built in Appian can quickly be integrated with legacy systems and databases like EHR to provide visibility into new reporting data. These modules can also be adjust as needed to meet changing needs or future requirements, without the risk of time-consuming coding or expensive customizations for COTS solutions.

Appian's industry-leading low-code platform and secure Appian Cloud is FedRAMP compliant, HITRUST CSF certified, and HIPAA-compliant. Additionally, Appian Cloud has achieved the COALFIRE ISO 27001:2013 certification, which demonstrates it has reached a high level of security maturity. The COALFIRE ISO 27001:2013 certification demonstrates that Appian has appropriate Information Security Management System (ISMS), which ensures management, operational, and technical security controls are operating effectively.

Appian is trusted by more than 40 US Government Agencies and more than 100 Public Sector customers worldwide, each of whom have strict policies, procedures, and security guidelines that Appian has been quickly configured to adhere to. Both Appian and Ignyte have a strong track record of meeting the most complex certification requirements in highly regulated environments.

**4.2.8 *What is your experience with interoperability?***

**a. *Does your solution align with FHIR interoperability standards, including use of standardization application programming interfaces (APIs)? Please explain and elaborate.***

Our solution is based on the Appian platform that has proven integrations with many common Electronic Medical Records (including Cerner and Epic). Furthermore, our solution can integrate all applicable health data with any industry leading EMR through its included Health Level 7 (HL7) Fast Healthcare Interoperability Resource (FHIR) standards-based API integration.

Appian's low-code Cloud Platform will enable the capabilities and the flexibility to adapt to OWC's ongoing needs in a secure and scalable way to manage the application and data. Additionally, Appian's Data Anywhere architecture and Record Sync (powered by HL7 FHIR standards) will support seamless integrations with any existing BMS systems and databases, EHR, and leading experience management platforms. We can also configure seamless integrations with any existing BMS or HCBS systems and databases through a rich suite of drag-and-drop guided wizards for standards-based integration via Open Database Connectivity (ODBC) or Application Programable Interfaces (APIs).

Our solution also utilizes role-based access control by default to control user types and permissions. Our granular access control model enables us to configure permissions and access rights at a data, process, and document level to reflect the State of West Virginia's security standards. The implemented controls will limit availability to application functionality, screens, assigned cases, data records, data elements, and data values where appropriate.

Appian provides an extensive list of zero-code workflow integrations and pre-built connectors for systems such as Salesforce, DocuSign, Microsoft Power BI, SAS, Tableau, and more. Additional details on Appian's available external integration connectors can be found in the link below:

[https://assets.appian.com/uploads/2020/09/ap\\_integration\\_datasheet\\_web.pdf](https://assets.appian.com/uploads/2020/09/ap_integration_datasheet_web.pdf)

Additionally, Appian includes wizards to establish connected systems with any standard REST or SOAP Web Service or API. Team Ignite has a deep bench of certified and experienced Appian developers, and our Premium Support and Architect Services partnership ensures that our talented team is backed by Appian's professional services to help address any emerging technical challenges associated with the integration of the Appian platform into your IT environment.

**b. *What is your experience integrating your solution with the following, and using what methods [i.e., API; custom interface; extract, transform, load (ETL); etc.]***

***i. Another vendor's or the state's IMS***

Ignite is currently developing an IMS solution to handle the intake, triage, resolution, and closure of incidents for a large public research university based in the DC area. The solution includes standardized incident response templates and offers a priority management module to help managers and agents identify which incidents to tackle first based on priority and severity.

***ii. Medicaid Management Information System (MMIS)***

Please refer to our response to 4.2.4.b.

***iii. Medicaid eligibility system***

Ignite has developed solutions used to check eligibility for Medicaid recipients. By leveraging Appian's low-code integration suite, our solution allows for sending and receiving of EDI messages to manage eligibility. Documents are parsed using Appian business rules to extract key data points. Patient profiles are managed within Appian, and eligibility data is pulled in to be displayed on Appian's elegant user-interface components.

Ignite has supported the Centers for Medicare & Medicaid Services (CMS) for the past year to streamline the manual auditing process for improper payments from Medicaid recipients. Our solution enables CMS employees to leverage live reporting and process vision, replacing a manual checklist that was previously

stored in 2,000 excel spreadsheets. Team communication, reporting, and checklist completion was consolidated into a single Appian application.

**iv. Individual providers**

Ignyte has developed a comprehensive solution to assist with the patient journey – from initial consultation, through conclusion of their treatment. To better manage the patient data, Ignyte integrated the Appian solution with the organization's existing EHR through standard API integrations provided by the platform. This integration provided a seamless experience for patient onboarding, treatment coordination, and appointment scheduling

**v. ASO systems**

Ignyte has designed a solution for a government agency to manage their ability to provide contract medical services to other agencies for Occupational Health. Leveraging standard API connections, our solution enables government employees to send and receive information from these ASO systems to enhance the processes within the Appian solution.

**vi. Managed care organizations (MCO) systems**

Leveraging the Appian platform, MCOs can streamline data collection and unify legacy systems into a single interface for advocates to manage pre-authorization requests for medical, surgical, and behavioral health procedures. Leveraging out-of-the-box integration capabilities, Ignyte and Appian can unify disparate data across the enterprise to provide a comprehensive view for end-users.

**c. What challenges have you encountered integrating or interfacing with other systems?**

Connection with legacy systems that do not have modern API connectivity can pose a challenge when developing an integrated solution. Ignyte has worked with clients to identify such cases of legacy system integration, and leveraged additional capabilities, including Appian's native Robotic Process Automation to send and receive data from legacy systems that do not have an API.

By applying industry standards, including HL7-FHIR, Team Ignyte minimizes the risk of how data is structured and expected to be returned in the external system. The terminology and structure still need to be maintained on each side, however the consistent standards ensure a smooth communication between the two systems.

**4.2.9 What is a typical implementation timeline? Please include key phases, milestones, drivers, and assumptions. What variables impact the implementation timeline, and how, for instance, number of HCBS waiver programs, number of providers, number of named users?**

Team Ignyte's proven delivery approach can provide a meaningful Minimum Viable Product (MVP) within 12-16 weeks. Additional releases may be required based on the level of complexity and scope of requirements. We forecast 2 to 3 releases to get to market

rapidly and adapt the solution based on BMS feedback and additional requested enhancements.

Organization Change Management, Project Management, and Testing overhead can be shared across multiple implementations when developed in-tandem. This allows for accelerated delivery and reduced level of effort.

#### **4.2.10 What conditions create a favorable environment for a successful implementation? What conditions add risk to implementations?**

The following factors are keys to providing a successful implementation. Omission or lack of these conditions may cause risk to the overall health and progress of the implementation.

- **Strong Product Owner & Stakeholder Alignment**
  - Establishing a strong product owner to define requirements and streamline execution of the project will ensure that the correct priorities are being tackled, the scope of the project aligns with the original goal, and that value is delivered quickly. Alongside a strong product owner, ensuring that the correct stakeholders are involved will ensure that the feedback and needs of the proper user-groups are being met with the developed solution
- **Availability of Documentation**
  - Legacy system guides, business process flows, database schemas, and other supporting information can be unavailable or difficult to find, which could potentially delay pivotal analysis. BMS should seek a partner that will provide detailed gathering requirements, as well as the templates and sample documentation required to make it easy for business and IT owners to provide data when data doesn't exist.
- **Establishing the Right Partnership**
  - To provide a meaningful solution, a partner that has experience identifying and solving problems, as well as an implementation strategy, is critical. A strong partner will ensure that a flexible and accurate approach is taken to solve all required business needs, along with strong technical skills to provide a scalable, performant, and integrated solution.
- **Change Management**
  - Complex, cross-organizational transformation is a challenge for any agency, and it requires clear rules of engagement across stakeholder groups. BMS should seek a partner that will utilize a structured change management approach, develop role-specific job aids, and proactively plan a stakeholder feedback process that will allow important changes to be incorporated.
- **Reliability of Vendor Analysis**
  - Complex software licensing/pricing, variability in user access and roles, as well as many available tools may make identifying a clear path forward difficult. It's

important to seek out a trusted partner with an extensive relationship with the leading technology vendors and a thorough understanding of their complex licensing and pricing models.

**4.2.11 What training and organizational change management support does your company provide?**

**Training**

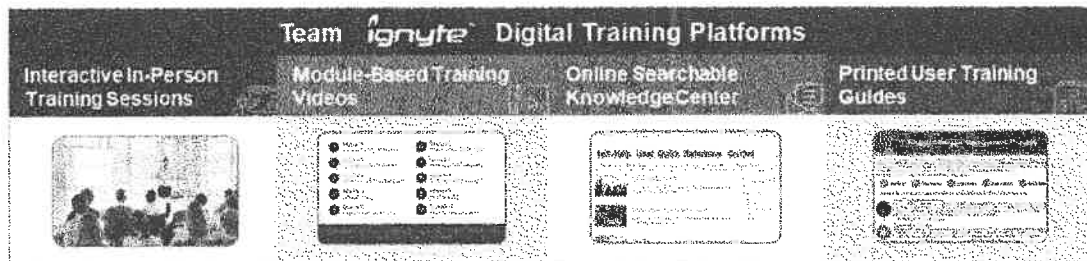
Team IgnYTE will provide comprehensive education and training materials to assist BMS users in using the modernized CMS/IMS solution. Using our expertise and past successes on similar projects, we will deliver a training plan along with hands-on, customized training & documentation.

Our approach views training as ongoing education rather than a “one-time activity.” With this in mind, our training plan incorporates the following activities to develop current and relevant trainings based on the audience in mind:

- **Assess BMS Audience:** Identify and assess BMS user personas, skills, and knowledge levels.
- **Develop Training Strategy:** Curate the appropriate strategy for each individual audience type and whether their preferred training is in-person, web-based, digital, or print.
- **Customize Training:** Focus on clarity, incorporate visuals, create engaging hands-on exercises, and innovate with searchable, online, and video-based multimedia.
- **Deliver Training:** Provide multiple in-person and virtual training opportunities to immerse system and support users with content that will educate and engage the intended audiences.

The trainings and documentation will be customized to the needs of BMS’ workflow processes and will be available for all users onsite. IgnYTE will supply master hardcopies, as well as copy and distribution rights to all training materials.

Team IgnYTE will develop several training materials for BMS staff including in-person interactive training sessions with hands-on exercises, module-based training videos, an online searchable Knowledge Center with self-help user quick reference guides, and print user training guides (Figure 16).



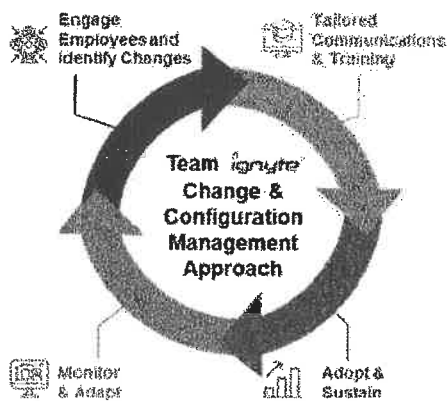
**Figure 16: Team IgnYTE In-Person and Digital Training Materials**



### Organizational Change Management

We consider all changes and their impact to users, which is why we tailor our configuration and change management approach each time the need for a change is identified. The process for rolling out new configuration changes follows a straightforward and repeatable process, outlined in **Figure 17**.

First, we will focus on directly engaging users to identify the changes that need to be made. This is done through hands-on user support, surveys, and monitoring help desk requests. Once the changes have been identified, we will determine the impact they have on the user and slot them to a release based on their criticality and prioritization. Tailored communication plan and training materials are created for each change within a release. The extent of these materials will be dependent on the scope of the change. Where multiple user roles are impacted, the communications and trainings will be tailored for each role. As changes are deployed, on-demand trainings empower users to understand new functionality and its alignment to business objectives. Team Ignyte continually monitors changes to evaluate adoption and opportunities to improve the user experience by adapting the solution. Our iterative approach means that change management and training are ongoing activities embedded into our process, not a one-time activity.



**Figure 17: Change & Configuration Management Approach**

The platform itself also offers various capabilities to compare differences between versions. The Compare Versions tool allows users to compare the latest version of any supported object type with any of its previous versions to understand and track changes in properties, definitions, and security. All versions of the software are stored and able to be reverted in the event of an emergency or a critical need arises.

**4.2.12 Please describe your CMS and/or IMS pricing model, and what features, products, services, licenses, etc. are included for each:**

- a. **For implementation (one-time and recurring, if applicable); what variables impact cost?**

The implementation of the Appian Cloud platform will be a one-time, upfront cost ranging from \$5,000 – \$10,000.

Appian offers a unitary license for the software; individual components are not separately priced. Unlike their competitors, Appian is a unified platform that is natively built as an enterprise low-code development platform in which all elements are in the one product, out-of-the-box. As such, Appian’s pricing model is straightforward and

based on a per-user/per-month model. Additional pricing factors include the number of users, frequency of use, and contract term. Appian licenses its software by granting an individual Named User license, which can be used by one person. Anyone authorized to access the software will have a Named User license. The Named User license grants the individual access to all features and components of the Appian Platform, including Case Management, Process Modeling & Orchestration, Rules Engine, Records, and Reports among many other capabilities. Licenses can be transferred between users at any point, providing BMS the flexibility to allocate resources as needed based on BMS user needs. Appian provides multiple license types depending on how a user will interface with the system.

Implementation Service costs are based on the level of complexity of the solution. The scope of the backlog and any potential integrations required will also affect the timeline of the period of performance, altering the cost as well. Ignyte can provide services on either a Firm Fixed Price (FFP) or Time and Materials (T&M) basis with a standard agile cadence. Our team is prepared to work with BMS to develop a mutually agreed upon timeline that will best suit your future needs.

***b. For on-going post-implementation (one-time and recurring); what variables impact costs?***

Post-implementation Services costs are based on the level of complexity of the solution developed during the initial period of performance. The scope of the backlog and any potential integrations required as part of the on-going support will also affect the timeline of the period of performance, altering the cost as well. Ignyte can provide services on either a Firm Fixed Price (FFP) or Time and Materials (T&M) basis with a standard agile cadence.

***c. Can system operations and maintenance be assumed by BMS or another vendor?***

Platform support will be provided by Appian to handle support cases, as well as infrastructure upgrades and maintenance. All solutions developed on the platform can be maintained by BMS or other vendors. Appian's low code drag and drop interface allows for trained business analyst with no coding experience to create BPMN-style workflows without any coding experience.

Ignyte will provide extensive knowledge transfers of the developed solution to ensure that designated BMS representatives have all applicable system documentation to perform enhancements in the future.

***4.2.13 In order to secure federal funding for this project, BMS must provide the Centers for Medicare and Medicaid Services with estimated implementation and on-going costs. We understand there are many variables that impact your pricing. Your assistance completing the table below is most appreciated. Please identify the nature of the cost for each line item, and add rows as needed. If more tables are needed, please include a supplemental file with your response. Assume four waiver***

*programs with the self-directed option plus the state's Money Follows the Person program and State Plan Personal Care Program are in scope; and up to 2000 users. It is not necessary to maintain this table format in your response. Please indicate where hosting in a secure cloud environment is included.*

Price Details for Initial Implementation		
Description	Low-End Estimate	Upper-End Estimate
Implementation Services (for CMS solution only)	\$250,000.00	\$550,000
Implementation Services (for IMS solution only)	\$200,000.00	\$400,000
Implementation Services (for <u>both</u> CMS and IMS solutions)	\$400,000.00	\$850,000
Appian Platform Licenses	\$720,000	\$1,248,000

**Pricing Details and Assumptions**

- Our estimated team size for the CMS-only solution approach is 4–6 team members over the duration of 12–20 weeks, depending on details and BMS' final scope.
- Our estimated team size for the IMS-only solution approach is 3–5 team members over the duration of 12–16 weeks, depending on details and BMS' final scope.
- The biggest variables in the level of effort include the amount of data migration, the quality of BMS' current data, the number of integrations to other systems required, the availability of APIs, the complexity of BMS' CMS/IMS workflows, and any other expected features.
- By implementing both the CMS and IMS solutions in parallel, BMS will be able to achieve economies of scale by sharing the overhead of project management, testing, and organizational change management.
- Our Appian Platform License pricing is based on the following assumptions:
  - Our Low-End Appian license pricing quote assumes that **none** of BMS' 2,000 users will use **both** applications for CMS and IMS
  - Our Upper-End Appian license pricing quote assumes that **all** 2,000 users would need to use **both** applications, and therefore, we would assign a platform license.
  - **Platform licenses enable a user to access unlimited applications.** This means that all additional applications built on the platform would not incur additional license fees.
- Appian has straightforward user-based pricing, and it does not charge for additional integrations, data per MB, etc.

- Our quoted pricing includes Appian's standard level of support, which includes a 99.8% uptime SLA and full technical support during local business hours. However, upgraded levels of support are available that would include high availability (e.g., 99.9% uptime SLA) and 24x7x365 support at an additional cost. More information about Appian's available levels of support can be found at <https://appian.com/resources/support.html>.

**4.2.14 What information do you need from BMS in future solicitations to create the most accurate and cost-effective pricing?**

In addition to the information described in the assumptions listed above, it would be helpful if BMS could provide detailed persona descriptions to better understand the needs of each unique user. Additionally, we would be interested in learning more about approximate number of different users to be supported.

**4.2.15 What types of solicitation requirements would prevent you from bidding?**

Appian's low-code platform is flexible enough to accommodate all your needs, based on our understanding from the RFI. The only types of requirements we would be unable to meet are overly restrictive expectations of COTS products. As the Appian licenses are structured on a per-user basis, we would also be unable to accommodate open-ended user counts and support expectations.

**4.2.16 Describe the major trends in the Medicaid HCBS waiver CMS and IMS solution space that you believe BMS should be aware of, including any product or approach changes that you believe will come to market within the next 12 – 24 months. How do your solution roadmaps stay current with such trends? If possible, please be specific regarding how these trends affect Medicaid, including WVCHIP, or healthcare IT in West Virginia.**

Ignyte has researched and determined the following trends will impact the Medicaid HCBS waiver market within the next 2 years:

**1. Online Waiver Submission**

Streamlining the intake of waiver submissions via online forms will allow agencies to better manage and triage submissions as opposed to fax and email alternatives. Ignyte's solution approach leveraging the Appian platform will allow BMS to quickly configure and enhance online portals for end-users to submit relevant information and supporting documentation.

**2. Communication with Provider Agencies**

Allowing for increased communication with providers will ensure that the entire claims and waiver process is accountable and easily accessible from both parties. Ignyte has leveraged many different features to enable better communication. Automated email notifications, embedded chatbots and in-app messaging will allow the solution to fit the trend of enhanced communication and collaboration across entities.

**3. Expanded Quality Measurement & Quality Improvement**

As states work to improve the health of their communities (more specifically the Medicaid population), there is an increased need for measuring the quality of life and

tenure of community living. Ignyte's accelerator solutions leverage a suite of questionnaires and Social Determinants of Health tracking to assess the quality of life for the given patient population. Providers can be notified of patients at-risk based on the configurable business rules. By embedding these measures to our solution, Ignyte ensures that providers and patients are better equipped to improve the quality of care being provided.

**4.2.17 In the states where you have implemented your CMS and/or IMS, what have been some of the notable program outcomes? What performance metrics were you able to provide to substantiate this success?**

For RMHS, Ignyte supported the migration of all of their programs onto the Appian ecosystem. During this 1.5-year phased migration, RMHS needed to keep data from both Appian and CaseLogic – their legacy client management system – in sync so that existing RMHS processes were not impacted. Ignyte used Appian's RPA capabilities to automate data entry and updates into CaseLogic, saving RMHS time and headache by simplifying a highly manual, error-prone process.

As part of the automation kick-start program, Ignyte brought in our product managers when they realized that Appian RPA could be used at RMHS. Since CaseLogic was a legacy web-based application, it had no APIs and therefore, users could only enter data manually from front-end interfaces. Appian RPA helped to automate this process using browser-based automation – when individuals submit referrals through their Appian Portal, RPA creates a new client entry in CaseLogic if the record does not yet exist. They also built robotic processes that update the CaseLogic record when changes have been made on the Appian side, ensuring that data between the two systems are always in sync.

RMHS' product managers worked closely with Ignyte as they built their robotic processes, providing design guidance and prioritizing their issues as they arise. This strong partnership, as well as recent low-code investments like the RPA designer and the RPA task recorder, were critical to the success of RMHS' RPA implementation. These enabled Ignyte's Appian developers to build and ship their robotic process within just weeks of development, despite not having any formal RPA training.

With Portals supporting the referral intake process, automation is more important than ever for back-end processes since inbound volume can vary greatly. Historically, RMHS has seen ~900-1000 referrals per month, so the projected time savings from using Appian RPA is ~150 hours per month. We expect that RMHS will continue to use these robotic processes until they have completed their migration from CaseLogic to Appian, which is aimed for the end of 2023.

**4.2.18 If BMS released an RFP that allowed vendors to bid on IMS only, CMS only, or CMS and IMS, which systems would you bid on and why? Please share any comments on this potential RFP structure in terms of how it would impact your interest in bidding.**

Ignyte and Appian have experience implementing both IMS and CMS solutions, and we would highly recommend requesting a vendor demonstration of common use cases at

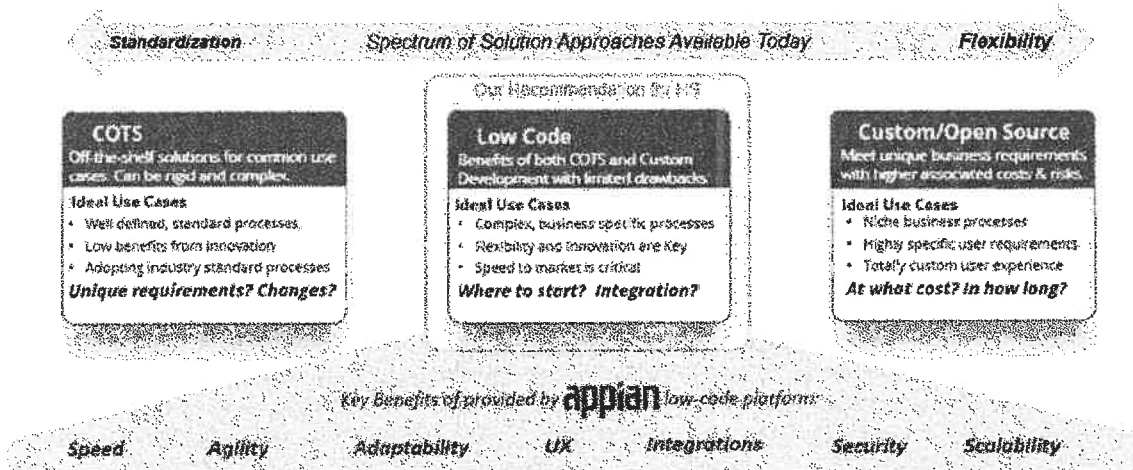
your convenience. Because Appian's flexible platform can be configured so quickly, our team would be willing to provide a demonstration on short notice to showcase the speed and power of Appian's low-code platform.

**4.2.19 Do you have a short demonstration of your solution that you would like to present to BMS? If BMS wishes to take part in a demonstration, BMS will reach out to the Respondent for further information.**

Team Ignyte would welcome the opportunity to present a demonstration of our working solution to BMS. We are confident that we can meet each of your requirements with minimal tailoring, based on Appian's out-of-the-box features in conjunction with our portfolio of working CMS and IMS solutions.

**4.2.20 Is there additional information you would like to share with BMS related to the topics addressed in this RFI?**

As detailed below in **Figure 18**, Appian's low-code platform provides all the major benefits included with COTS and custom-developed solutions without being inflexible or having a high cost of overhead and maintenance.



**Figure 18: Key Benefits of Appian**

Unlike a COTS solution, Appian's platform is continuously improved to integrate with the latest technologies, and it can easily be tailored to meet your unique requirements and changing needs. With Appian's proven pre-configured capabilities, you can quickly have a solution that's custom-fit to your needs, integrates with your existing systems, and is flexible to change. While a custom/open-source solution can also be tailored to highly specific requirements, it's often the most expensive and time-consuming option. The flexibility of the Appian Platform enables most enhancements to be delivered within weeks or months, not a rigid annual or semi-annual release cycle associated with many COTS packages or custom development.

Additionally, Appian provides a Business Associate Agreement (BAA) to its customers certifying that their Appian cloud instances are HIPAA compliant. Appian customers can then build, deploy, and utilize business applications that utilize Protected Health Information. It has proven integrations with leading Electronic Health Records and fully supports Health Level 7 (HL7) Fast Healthcare Interoperability Resource (FHIR) standards-based integration.

Appian is the only recognized leader in business process automation, low-code application development, and case management by trusted sources, including Gartner and Forrester.



## APPENDIX A – CERTIFICATION AND SIGNATURE PAGE

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### Request for Information

### CRFI BMS2300000001

### (West Virginia Bureau for Medical Services)

By signing below, I certify that I have reviewed this Request for Information in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this response for review and consideration on behalf of my organization.

Ignyte Group, Inc.

\_\_\_\_\_  
(Company)



Jason Stanis, Chief Technology Officer

\_\_\_\_\_  
(Representative Name, Title)

(P) 517.505.7039 (F) 202.318.8761

\_\_\_\_\_  
(Contact Phone/Fax Number)

September 20, 2022

\_\_\_\_\_  
(Date)

Revised 6/8/2018