



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia
Centralized Request for Proposals
Info Technology

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BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON WV 25305

US

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2025 MAR 28 AM 9:44

WV PURCHASING
DIVISION

VENDOR

Vendor Customer Code:

Vendor Name : WSD Digital, LLC dba ReFrame Solutions

Address : 2 Waterside Crossing, Suite 301

Street :

City : Windsor

State : CT

Country : USA

Zip : 06095

Principal Contact : Catherine Fleming, Enterprise Sales Executive

Vendor Contact Phone: 404.317.1165

Extension: N/A

FOR INFORMATION CONTACT THE BUYER

Toby L Welch

(304) 558-8802

toby.l.welch@wv.gov

Vendor
Signature X

FEIN# 83-1782686

DATE March 27, 2028

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

ADDITIONAL INFORMATION

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. Va. Code 5A-3-10b, for the West Virginia Secretary of State's Office (hereinafter referred to as the "Agency") to provide a contract for the purchase to develop an all-inclusive, centralized voter registration database solution and campaign finance reporting system with all associated services, maintenance and support, installation and training per the attached documentation.

**** Online responses have been prohibited for this solicitation, if you have questions contact the Buyer - Toby Welch @ toby.l.welch@wv.gov

See attached instructions for requirements for responding.

INVOICE TO		SHIP TO	
SECRETARY OF STATE BLDG 1 STE 157K 1900 KANAWHA BLVD E CHARLESTON WV 25305-0770 US		SECRETARY OF STATE BLDG 1 STE 157K 1900 KANAWHA BLVD E CHARLESTON WV 25305-0770 US	

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	SVRS/CF Development, Delivery and Source Code Delivery				

Comm Code	Manufacturer	Specification	Model #
81111500			

Extended Description:

Centralized Voter Registration and Campaign Finance Reporting Portal System- Development, Delivery and Source Code Delivery

Vendors MUST fill out Cost Sheet included as an attachment and separate from the technical proposal. Labeling each respectively. See Section 6 of the Instructions to Bidders

****ONLINE SUBMISSIONS OF REQUESTS FOR PROPOSAL ARE PROHIBITED****

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Questions are due by 3:00 p.m.	2025-03-19

Cover Letter

March 31, 2025

West Virginia Secretary of State
Department of Administration
2019 Washington Street East
Charleston, WV 25305
Attention: Toby L. Welch

Dear Mr. Welch,

With a proven solution and team of domain experts, ReFrame Solutions is ready to partner with the West Virginia Secretary of State (Agency) to provide our **ReFrame Elections** and **ReFrame Disclosure** software solutions in response to WVSOS SVRS & Campaign Finance Systems RFP. Our in-depth proposal identifies how our all-inclusive solutions can meet and exceed your requirements for this most important project.

ReFrame Elections provides an integrated solution for Online Voter Registration and Voter Registration Database, Election Management, and Election Night Reporting. Similarly, **ReFrame Disclosure** delivers the robust tools needed to provide transparency for candidates, lobbyists, and the public. Both solutions offer a modular architecture that leverages modern technologies, regular updates, and robust customer support for the Agency. ReFrame Solutions can radically improve your operational efficiencies and end-user performance with our purpose-built and proven solutions.

By selecting ReFrame Solutions, the Agency benefits from a modern integrated system leveraging our proven project methodology. Assuming a project kick off date of April 14, 2025, we offer an expedited 10-week implementation for the **ReFrame Disclosure** Campaign Finance solution with a **go live date of June 30, 2025**, and continuing with a concurrent 30-week implementation for the **ReFrame Elections** solution by **November 10, 2025**, effectively meeting your objectives delivering both modules this year as stated in the RFP. Our success with four similar implementations in Arkansas, Idaho, New Hampshire and Vermont should offer the Agency confidence in not only our project methodology, but assurance after the fact that our maintenance and support are superior to our competitors.

We encourage the Agency to contact our references to hear firsthand how ReFrame's customer-obsessed mission and innovative technology set us apart in the industry. We believe in partnership with our customers and look forward to providing value to the Agency. Your contact for this proposal is Catherine Fleming, Enterprise Sales Executive. She can be reached at 404.317.1165, or proposals@wsddigital.com, should you have any additional questions or need any additional information.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read 'Anand B'.

Anand Balasubramanian
Chief Executive Officer
reframesolutions.com

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SECTION 4: PROJECT SPECIFICATIONS

- 4.1. **Background and Current Operating Environment:** Currently Agency has a license for two separate systems: (1) centralized voter registration system, and (2) campaign finance reporting system. Agency seeks to consolidate the functionalities of a centralized voter registration system and campaign finance system into a bundled contract, which systems are integrated, as well as maintenance and support for the statutory maximum five (5) years (broken down as one (1) year, with four (4) years of optional renewals per state law).

We understand the Agency's goal to modernize and consolidate your systems. With a deep understanding of the industry, ReFrame Solutions developed our state-of-the-art, secure platforms, including **ReFrame Disclosure** for Campaign Finance and **ReFrame Elections** for Voter Registration, Election Management, and Online Voter Registration, to streamline the processes for Secretaries of State. This bundled offering meets, and even exceeds, the Agency's expectations for contracting, maintenance and support.

ReFrame Disclosure

Designed for the modern era, ReFrame's platform empowers administrators to seamlessly configure elections, reporting periods, thresholds, and limits to meet statutory requirements. Administrators can also send reminders, compliance notices, and personalized communications, ensuring filers stay informed and compliant.

Additionally, the system allows for configurable fine calculations, enabling automatic assessment of fines. Filers benefit from an intuitive, streamlined experience simplifying data entry for disclosure reports, and can conveniently make payments using our integrated payment gateway. With a commitment to transparency, ReFrame's platform ensures the public can access 100% of disclosed information, building trust and accountability by showcasing the influence of money on elections.

ReFrame Elections

ReFrame Elections is a comprehensive system tailored to your requirements and offering an engaging user experience for your staff and constituents. The system provides, based on your requirements, all the functionality needed by the Agency. This includes the ability to capture and display all required and optional fields in the voter registration record, assign a voter registration identification (ID), set the voter registration status, and track voter registration condition codes. In addition, each voter's residence address is captured and used to assign the voter to districts and precincts, as well as to capture a mailing address if different. The system also can track critical dates, identify and resolve duplicate voter registration records and change political affiliations.

The system completely supports determining the voter's age as of an election, all the unusual requirements of federal overseas voters/UOCAVA voters, and flagging a voter as requiring proof of ID. The system will allow users to process undeliverable and forwarded mail, as well as identifying a voter registration that is related to a request for an absentee ballot.

ReFrame has implemented four (4) Campaign Finance Systems in Arkansas, Idaho, Vermont, and New Hampshire using the same project methodology we recommend for your system. These

projects have performed with the highest praise of the clients over multiple filing periods. We also are in the implementation phase for the Georgia State Ethics Commission – a project that is on-budget and on-time. Based on our team's experience and the degree of fit of our robust solution to your requirements, our 10-week implementation for the **ReFrame Disclosure** solution will go live June 30, 2025, to keep with your goal date of July 1, 2025.

Our **ReFrame Elections** solution, have been live since mid-2024, has also performed without issue despite the challenge of implementing during the Presidential Election year. Vermont's Election System will go live in May 2025 with great project success so far. After the go-live of Campaign Finance for West Virginia in June 30, 2025, we will continue with the concurrent 30-week implementation of the **ReFrame Elections** solution by November 10, 2025, effectively meeting your objectives of delivering both modules this year as stated in the RFP. These expedited options offer the Agency low risk and can significantly reduce costs.

We understand the contract term and are prepared to fulfill it. One of our core values is to be *customer obsessed*, meaning our focus is on you and your goals. Our maintenance and support are unparalleled in the industry with a team of domain experts who truly understand the pain points and challenges you face.

- 4.2. **Project Goals and Mandatory Requirements:** Agency seeks to procure development of a centralized voter registration system and campaign finance reporting system, which are integrated, that will be considered in-house systems for long-term stability and consistency in election systems in use in West Virginia. For the same reason, agency desires to be the owner of the source code of the integrated systems for flexibility and longevity, and to benefit the State from its development of these systems by receiving credits against maintenance and support from the development vendor for any future sales of the system developed, whether derived in whole or in part from the Agency's system.

While the desire for an in-house system is understandable, our approach is focused on radically improving performance for government and enterprise solutions through a cloud-native platform and increased focus on customer service. Our strength comes from highly matched, highly successful, domain-experienced resources with deep experience in serving state agencies responsible for campaign and election systems. By developing purpose-built solutions specifically tailored to our customers and their processes, we offer not only stability, but the flexibility to grow and adapt as your needs change.

Our differentiators in this market include:

- No competitor is likely to offer source code ownership to the Agency after the initial contract term, as suggested in this proposal.
- More resources with direct experience and domain knowledge about voter registration and campaign finance modules and their required features, functions, and data structures than any other company in the market.
- Well-positioned to understand the current data, functionality, and business rules needed to be recaptured using our modern technology.
- Consultative-partnership approach to enhance your current business processes through workflow improvements optimizing efficiency and the customer experience.

- No competitor is better positioned to deliver an on-time, successful data migration and conversion.
- No competitor is better positioned to save the Agency time and money on business requirements documentation, which is a crucial and time-consuming phase of the project.
- 24/7/365 availability with pre-approved maintenance windows occurring outside of normal business hours.
- The average page is designed to load in under 3 seconds, with more complex reports and exports having a target of less than 10 seconds.

Vendor proposals will be evaluated as provided herein, which include, in part, the project timeline and capacity to deliver a fully developed product and replace existing systems by no later than July 1, 2025, or at least prior to the start of the next election cycle by December 31, 2025.

Based on a review of your requirements and your desire to establish a rapid timeline for deployment, we are confident a 10-week implementation for the **ReFrame Disclosure** system with go live by June 30, 2025, and a concurrent 30-week implementation for the **ReFrame Elections** system by November 10, 2025, offer the best timeline to achieve a successful deployment and ensure all of your requirements are fulfilled.

The system shall provide all statutorily required functions for a centralized voter registration system and campaign finance reporting system, which vendors can find in Chapter 3 of the West Virginia Code.

Our team is experienced in statutory and compliance for both voter registration and campaign finance reporting. During the gap analysis, statutory requirements are identified and incorporated into your system.

Vendors should describe their approach and methodology to providing the service or solving the problem described by the goals/objectives identified below by the timeframe required. Vendor responses should include any information about how the proposed approach is superior or inferior to other possible approaches if different than the proposal by Agency, and justify such succinctly.

The Agency is proposing a very aggressive implementation timeline of completing the project at least prior to the start of the next election cycle by December 31, 2025. Our proposal is for a 10-week implementation for the **ReFrame Disclosure** solution with go live data to run concurrently with a 30-week implementation for the **ReFrame Elections** solution. To meet these expectations, we must rely on a code base that is already developed, licensed, and in production in several states. ReFrame was in development for over a year, respectively, in the creation of the initial codebase for **ReFrame Elections** and **ReFrame Disclosure**. If we were to rely on a new, unproven code base created specifically for the Agency, we would be unable to meet the goals/objectives identified in the timeframe provided. Furthermore, additional fiscal impacts will be felt if ReFrame does not start with a proven, secure software solution. In addition to the implementation costs, there would also be ongoing development costs associated with maintaining a custom code base. Rather than being able to share and capitalize software development

expenses across a software solution, the Agency would be responsible for the fiscal commitment to maintain the new codebase.

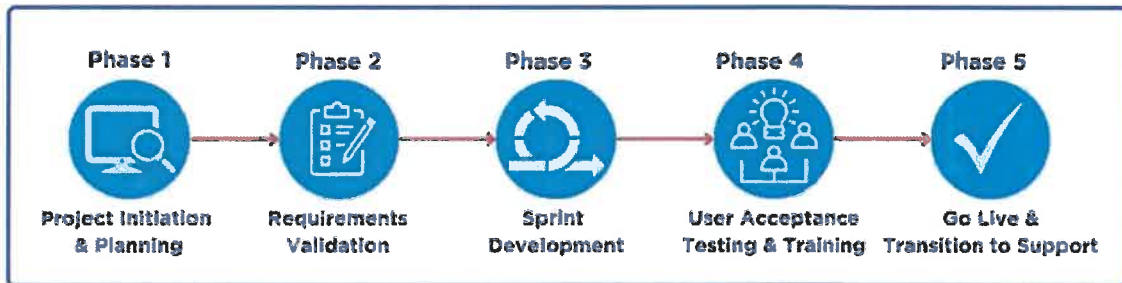
To provide the Agency with comfort in transitioning to a new solution, as part of negotiations ReFrame would consider placing the source code in escrow for access should there be an issue requiring the Agency to need access to the code. We firmly believe should the Agency choose to partner with us and implement the current code base for **ReFrame Elections** and **ReFrame Disclosure**, the Agency can meet its goals of having a modernized system providing the long-term stability and consistency that it desires.

A differentiator for ReFrame is our extensive experience in delivering large, complex, statewide public sector technology projects through our innovative and proven hybrid Agile model for project delivery. By incorporating some of the best principles of the popular Agile method to achieve quick wins and reduce overall risk to the project, systems can be implemented in a timely manner.

This hybrid plan shares some of the best principles of the popular Agile method to achieve quick milestones, as well as reduce overall risk to the project and offer some flexibility. The hybrid plan also reduces pressure on your project team in a short timeframe if they are not fully versed in formal agile development processes. Our proposal includes a detailed project plan to demonstrate how your goals and objectives are achieved in an expedited timeframe.

The Agile approach allows smaller groups of functionalities to be continually analyzed, documented, configured, and demonstrated to the Agency throughout the early phases of the project. This is followed by a traditional full system and user acceptance testing being performed on the entire integrated codebase prior to go-live.

The Agency's project plan is developed based on the scope of work outlined in the RFP and follows a phased approach for implementing your solution, thus ensuring a measurable and successful transition.



Phase 1 – Project Initiation & Planning

During the Initiation and Planning Phase, the preliminary Project Management Plan is reviewed and updated in close coordination between The Agency and ReFrame Project Manager (PM). Using information generated from preliminary discovery and validation sessions with the Agency project management team, the Project Management Plan and its sub-deliverables are revised.

The Agency receives the preliminary versions of the documents during the Initiation and Planning Phase, to ensure the most core tools, processes and expectations are baselined from the start. Throughout the life of the project, as part of each incremental phase (sprint), ReFrame updates, further details, and amends the full set of documentation in real time through the actual execution. Any significant changes (architecture, toolsets, or expectations of the Agency resource support) are coordinated with the Agency PM for written approval before any phase involving the proposed changes is performed.

Document	Description
Communication Plan	<ul style="list-style-type: none"> • Schedule of standard communication • Process to develop and issue communiqués • Roles & responsibilities • Content, formats, & methods of distribution • Tools available to improve collaboration & information sharing
Resource Management	<ul style="list-style-type: none"> • Organizational chart & narrative for team members defining all key roles, including positions, titles, organizational relationships, unit functions, individual duties, contact information, & other related information. • Policies for changes to personnel or the level of commitment to the project (i.e. requires Agency approval)
Risk & Issue Management Plan	<ul style="list-style-type: none"> • Purpose • Risk Management Approach <ul style="list-style-type: none"> ○ Risk Identification ○ Risk Analysis ○ Response Planning ○ Risk Monitoring and Control • Roles and Responsibilities <ul style="list-style-type: none"> ○ Project Manager ○ Project Team ○ Project Sponsor ○ Project Stakeholders • Risk Identification <ul style="list-style-type: none"> ○ Sources ○ Documentation • Response Planning <ul style="list-style-type: none"> ○ Risk response <ul style="list-style-type: none"> ▪ Avoid ▪ Transfer ▪ Mitigate ▪ Accept • Risk Monitoring and Control <ul style="list-style-type: none"> ○ Background

	<ul style="list-style-type: none"> Documentation
Change Control Plan	<ul style="list-style-type: none"> Establishes a Change Control Board with Communication Plan. Outlines process and procedures for submitting change requests including level of detail & estimate methodology: <ul style="list-style-type: none"> Description of Change Control numbering <ul style="list-style-type: none"> Who is requesting change: Contractor, Subcontractor, or Client & date submitted/completed Priority & proposed cost of the change Estimated impact on the project schedule Impact on application, if change is made or if change is not made Approval line for contractor's PM & Agency's PM Procedures for evaluating all change requests for approval or denial. Expectations for maintaining a Change Control Log to track all modifications that affect the original documentation (requirements, process decomposition, business rules, data flow, manuals, etc.)
System Test Plan	<ul style="list-style-type: none"> Describes testing of the total system, including application functions, all interface elements, data, backup & restore capabilities, security, and those measures designed to support availability. Includes provisions for a complete testing regimen: <ul style="list-style-type: none"> Network/Communication testing Performance testing Load testing Full integration testing System acceptance testing Data conversion testing Security, backup & disaster recovery testing Unit/module testing User acceptance testing Regression testing (automated) For each type of Testing the plan includes: <ul style="list-style-type: none"> Schedules Roles and responsibilities Tools used Test scripts Test data baselining & restoration process Issue reporting mechanisms Remediation tracking & reporting Rollback procedures

Training Plan	<ul style="list-style-type: none"> • Application Training – Prior to implementation, ReFrame trains all Agency staff. • Architecture Training – Training must be conducted for at least two employees regarding the operation, maintenance, remote management, & onsite support. • Software Training – Training must be conducted for at least two employees regarding the software (excluding the application) used to support & supplement the application. • Database Training – Training must be conducted for at least two employees regarding the support & maintenance of the database. • Annual Maintenance and Support – Training must be conducted for at least two employees on the maintenance & support of the application & the application development tools.
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The Project Kickoff Meeting is a key event to initiating project planning and governance efforts. Recommended kickoff meeting session attendees include Agency Project Manager and other key stakeholders (executives, staff, IT, partner agency representatives, etc.) and the ReFrame key personnel. During the kickoff meeting, the stakeholders address the following topics:

- Describe the project purpose, expected goals, and deliverables.
- Introduce and discuss Agency, ReFrame, and other stakeholders' specific roles and responsibilities.
- Review governance & communication protocols.
- Project plan walk through to establish a timeline & manage team member expectations.
- Explain quality management & test program components.
- Discuss risks and issues including mitigation measures.
- Determine the appropriate time and day of the week for weekly one-hour project status meetings.
- Review a full 90-day plan with a calendar of key activities, meetings, and milestones.

A subsequent kickoff meeting may be scheduled to discuss lessons learned and to introduce new stakeholders to the project.

Phase 2 – Requirement Specifications

Although the pure Agile project lifecycle methodology advocates for less early documentation in favor of developing working code, The Agency's project requires an extended requirements and design phase to ensure the intensive legislative, security and core functional complexities of a

government & public sector solution are adequately understood prior to initial configuration/customization. ReFrame initiates gap analysis activities over an initial five-week set of collaborative sessions with the stakeholders to validate and document the more detailed business and functional requirements for the system modules. The gap analysis feeds the work to be performed in the early development sprints in the Sprint Development Phase. This ensures full developer productivity from Day 1 and the basis of a core solution without possibly radical, re-development later due to unclear overall direction. Subsequent sprints include the continued iterative analysis and documentation for the more detailed requirements to be developed in the future sprints, with the benefit of being based on the actual outcomes, lessons learned, and improvements made in the iterations that preceded. While we have planned adequate time for the Requirement Specifications Phase, we are confident we have a strong head start in understanding the Agency's detailed functional specifications based on our team's unmatched level of experience in completing similar projects for like-agencies in this domain. This head start offers assurance that the committed timelines in the plan can be met, thus reducing project risk.

The full set of detailed process recommendations and functional specifications are delivered via User Stories in Azure DevOps to guide the development of all system features including:

User Story Contents	
Technology Components	Dashboard & Report Parameters
Interfaces & Data Exports	Data Migration & Transformation Tasks
Screens & Views	Correspondence & Forms Management
Security Architecture	

The Requirements Specifications Phase starts with the functionality related to the core system and continues through the requirements for all modules until the entire end-to-end solution is documented and approved.

Phase 3 – Sprint Development

Upon approval by Agency, the documented formal, approved requirements in user stories serve as the basis for design and customization. Under the direction of the stakeholders, we prioritize the backlog of requirements into a preliminary sprint plan focusing on the most core/critical features and all modules first.

Note: Backlog is an Agile process term that refers to functionality on deck or in line to be developed and does not imply the project is behind schedule.

As sprints (or a logical grouping of sprints) are completed and working code becomes available, the code deploys to a staging environment and the ReFrame PM and Business Analyst conduct

show and tell sessions with the stakeholders to demonstrate Agency specific software configurations and functionality with working code. This allows for earlier demonstration of features for stakeholder review and buy-in, as well as providing an opportunity for the Agency to perform some preliminary hands-on testing. This early testing is not to be considered a full or formal User Acceptance Testing (UAT), which occurs at a later phase against the end-to-end code. This iterative design and review approach enables us to identify issues before excessive system re-design and/or re-development changes are necessary and provides informal training value to the resources that will most likely be testing the system capabilities during UAT.

Data needed to test the sprint releases is provided by the conversion team wherever possible to allow data conversion to be carried out in parallel with software configuration sprints, and is conducted by a separate, dedicated team of specialists to focus on the most complex and critical element of the project.

The configuration, technical specifications and solution modifications including source code and databases are maintained in the controlled Azure DevOps Configuration Management System (CMS). ReFrame uses a workflow process to assign tasks in the CMS to technical staff to implement the solution design. CMS enables the ability to manage and control configuration and development work from initial assignment through configuration, testing and acceptance with strong check-in/checkout features and traceability to the solution design and documented Agency requirements. Product code is always integrated in the CMS shared repository and modifications can be rolled back, if needed. In coordination with data conversion and migration activities, solution configuration and modification development use the target database schema and actual data to ensure solution behavior meets requirements mandated in the solution design for the iterative solution functionality being deployed. ReFrame uses Azure DevOps to allow stakeholders to have the most visibility and reportability of system requirements and their status/issues.

Phase 4 –User Acceptance Testing & Training

User Acceptance Testing

As solution components are configured for subsequent deployment to the staging environment for system integration and user testing, ReFrame technical leads review the configuration, along with any solution modifications to ensure software source code meets development standards for the project as well as the design requirements (including performance measures). If any item fails code review and testing the work item is returned to the technical staff for correction. Once completed updates are tested and approved, the configuration is included in the next solution deployment build deployed in the UAT environment for Agency acceptance.

In this phase, the integrated end-to-end components are fully tested by the ReFrame team against the requirements identified and detailed during the previous phases. The results of this System Integration Testing (SIT) will be shared with the Agency for approval before moving to UAT. This is designed to assure the stakeholders that critical/high system and performance issues have been identified and resolved during previous test phases (unit, functional, and system integration), and the design meets documented specifications. UAT testers are trained in basic system operation and use test cases to guide the testers through the successful acceptance testing of the system. ReFrame provides on-line issue tracking and management software to ensure an efficient process

of error reporting. Once the testing has been completed for a given phase, that phase moves to the Training and go-live activities as described below.

Training is initiated after UAT is completed. In this phase, ReFrame installs the customized application in the Production Environment for training purposes. The goal is to provide the skills, knowledge, and abilities necessary for the users to succeed and effectively operate the Agency's solution. The Training Plan provides a roadmap of the detailed schedule, objectives, and key deliverables associated with training on the solution. It is assumed users already have basic computer skills allowing ReFrame to immediately begin training on the solution. We monitor and assess the training and conduct post-training evaluations to ensure the users are performing at the expected levels. The Training Plan also documents ReFrame's strategy for potential training of end users in response to future process or functional changes impacting user operation of the system. Refer to the sections above for a more detailed description of our Training Plan and Approach.

Phase 5: Go-Live & Transition to Support

During this phase, plans are finalized for the cutover to production, initial support models are put in place and the new application is readied for the production environment. The Transition and Installation Plans describe activities required to migrate from the existing environment to the new environment. Based on scheduled interviews with stakeholders throughout the project, a variety of inputs and perspectives are used to finalize the tasks for implementation. Following signoff on the activities by Agency, ReFrame assigns ownership of the activities to individuals or groups to determine proper handoff points.

With Agency approval of both UAT and the Transition and Installation Plan, final data load scripts of solution data to be converted is executed. The new application is placed into production, final automated regression testing and some necessary manual checks validate the build and ReFrame works closely with Agency to ensure any production issues encountered are resolved. Close monitoring of the solution's performance and testing are carried out during initial go-live before the solution access points and credentials are activated for production use. Once the solution is determined to be performing acceptably, the go-live for all users begins. Once final approval and acceptance are provided, the final Transition Report detailed the results of the transition as the project moves into the maintenance and support contract period.

4.2.1.Goals and Objectives -The project goals and objectives are listed below. Bid responses must provide a narrative that addresses each element in each sub-paragraph listed below.

- 4.2.1.1. Develop a new centralized voter registration system and campaign finance system to Agency specifications as provided herein, consistent with industry standards or better, in compliance with state and federal law, and in satisfaction of nationally recognized security recommendations, which systems shall be integrated to accomplish the functions of a cohesive centralized voter registration system and campaign finance reporting portal.**

As an experienced vendor, ReFrame Solutions can offer both a centralized voter registration system and campaign finance system developed by technical resources, subject matter experts, and support staff who are highly capable, experienced domain experts. The Agency can rely on our experienced team with significant direct experience working with Secretaries of State to understand the intricacies involved in migrating data and processes from legacy systems to a new system. With ReFrame, you will experience a consultative partnership approach that will reduce confusion, increase efficiency, and identify compliance concerns more effectively.

ReFrame Elections is a state-of-the-art solution that was built from the ground up with security-first, mobile-responsive, ADA friendly, and UI/UX architecture and design techniques supported by the latest technologies and the vast benefits of being hosted in a secure cloud environment. Some capabilities available include centralized voter records, absentee ballot processing, jurisdiction/district management, polling locations, and many more. The solution has been live in New Hampshire since April 2024, and goes live in Vermont, in May 2025 performing beyond initial expectations.

ReFrame Disclosure is an innovative SaaS solution securely hosted in the Azure Cloud using services to maximize availability, scalability, and performance. The solution is purpose-built for government agencies to manage campaign finance, lobbying activity, and personal finance disclosure modules. With robust, intuitive online portals and configurable back-office processing and approval mechanisms, the system is built to modernize and streamline Filer and Agency Staff processes while significantly improving customer service. Features such as an AI Chatbot, "Know Your Customer" identity verification, mobile responsiveness, and API-friendly architecture make it the most modern technology available. The solution has been live in Arkansas since September 2023, Idaho since December 2023, New Hampshire since May 2024, and Vermont since January 2025.

As both systems are cloud-based solutions, including full managed services, the Agency does not need any infrastructure or equipment other than:

- Ensuring desktop users have a modern desktop/device supporting the latest browser versions.
- If direct scanning into the application is a requirement, those users would require any Twain-compliant desktop or network scanner.
- Maintaining your current internal environments, tools, and licenses for the needed GIS components, such as Esri ArcGIS Enterprise, Geo Database, Esri Parcel Fabric, etc.
- Maintaining your current EDMS (i.e. SharePoint, FileNet, etc.) for external archiving requirements.

- 4.2.1.2. Agency to exclusively own all rights in and to the systems, which rights shall be licensed to Vendor for use or sale outside of West Virginia.

ReFrame Elections and **ReFrame Disclosure** are established software solutions that are licensed and maintained by ReFrame Solutions for many states. There are significant resources dedicated and employed by ReFrame Solutions to make sure the codebase is secure and enhanced every year. With the historical and future investments planned our core solution IP will always be owned by WSD Digital, LLC dba ReFrame Solutions.

- 4.2.1.3. Agency to receive credits upon future sale(s) of the system or new versions of the system that are developed by Vendor in whole or part with the Agency's system source code and later sold, which credits shall be applied to future development, maintenance, and support at Agency's discretion. Proposal shall set forth events that result in Agency earning credits, as well as the value of each credit. Format for this portion of the proposal may be in table form or a clearly written narrative.

As mentioned earlier, ReFrame is respectfully offering an approach relying upon our proven, secure software solutions **ReFrame Elections** and **ReFrame Disclosure** to meet the aggressive timeline of at least prior to the start of the next election cycle by December 31, 2025. By utilizing this approach, the Agency's goals will be met in the most cost effective and efficient manner.

- 4.2.1.4. Vendor to provide maintenance and support of the centralized voter registration system and campaign finance reporting portal, which maintenance and support services include direct communication contact with vendor's agent(s) assigned to Agency's systems, and whose agent(s) shall be specifically designated to the Agency's system. Bid submissions shall include pricing in the appropriate form for the state-maximum five (5) year term (one (1) year minimum, with four (4) optional renewals per state law) for a maintenance and support contract, with each year being priced separately in line-item fashion.

Our team has significant experience providing support services. Our approach to technical support services is derived from principles of the industry standard Information Technology Infrastructure Library (ITIL) framework and consisting of:

- Ensure SLAs define the appropriate targets and responsibilities
- Provide frequent opportunities for customer feedback and customer satisfaction surveys
- Have familiarization with each customer's business context, journey and experience
- Use non-technical language during customer interactions
- Provide frequent internal review of outcomes and practices to adjust, as needed

ReFrame retains support staff from the original implementation team at the level necessary for the solution to be fully available and usable according to an agreed upon Performance SLA, including a 60-day warranty period and extended maintenance and support based on the requirements of the RFP.

ReFrame ensures the system is operating at mutually agreed performance levels. Agency requests for support, regardless of the nature of the request, go through a dedicated ReFrame Support Center. Designated Agency staff can contact the Support Center by using our support contact form to create a helpdesk ticket and initiate the support process.

Part of ReFrame's *customer obsessed* focus means that we recognize during time critical, high-volume events, such as Elections, Filings, registrations, increased support may be needed. During these periods, ReFrame offers a **hyper care support window** to support your Clerks, Elections team and Campaign Finance support staff with a dedicated ReFrame team closely monitoring the software. When the hyper support window is activated by the Agency in consultation with ReFrame, the SOS team can expect increased support and rapid issue resolution to ensure a smooth transition for end-users. The hyper care window may include:

1. **Dedicated Support Staff:** Experts on hand to address any issues swiftly.
2. **Increased Monitoring:** Real-time tracking of software performance.
3. **Priority Incident Handling:** Fast-tracking any critical issues to prevent disruption.
4. **Frequent Communication:** Regular updates and open communication channels.

Support Levels

Level 1 Support

- Answer questions regarding issues with the operation or performance of the software application
- Analyze problem reports
- Determine the nature of problem – data, software, operation
- Recommend workarounds, when feasible
- Escalate software issues to Level 2 to log trouble tickets for problem triage or for software and database analysis
- Follow-up with final resolution, when necessary to the person initiating the call
- Route non-software questions about election processes and rules back to the Agency Help Desk.
- Log enhancement requests and initiate change control procedures as necessary.

Level 2 Support

- Research escalated problems; perform root cause analysis and plan corrections

- Recommend implementation plans for corrections (i.e., hot fix patches, interim builds, or future releases)
- Develop temporary workarounds as required
- Correct software defects
- Perform application and database performance tuning
- Update code on an agreed-upon release schedule with release notes
- Notify Level 1 Support of the resolution

Help Desk Access & Defect Reporting

Eligible Users	Designated Agency staff
Help Desk Agreement Levels	Level 1 and 2
Help Desk Hours	To be provided upon contract execution.
Telephone Number	To be provided upon contract execution.
Help Desk Email	To be provided upon contract execution. Available 24/7, monitored during business hours specified above.

Help Desk Priorities and Escalation Protocol

All problems escalated to Level 2 and all enhancement requests will also be posted in the internal ticket tracking system. Status updates will be provided to the authorized user as the status of the ticket changes.

Additionally, the Agency is assigned a designated maintenance manager who focuses on the success of your solution. If an authorized user sends an email or leaves a voicemail message, a ticket is still opened for the user's problem or question as quickly as possible. Enhancement requests may also be initiated by this same process. Tickets are categorized according to the severity of the problem. As help requests are received, a ticket is created and assigned a priority based on the severity of the problem. The table below outlines the three priorities, their definitions, the response times to be expected, and the update frequency.

Level	Severity	Issue	Initial Response Time	Update Frequency	Resolution Time
1	Critical	System currently not functioning, application is completely unavailable or severely impaired. Multiple users are unable to access functionality. No suitable workaround is	Less than 1 business hour	Every 1 hour	1-4 hours

		available.			
2	High	System is not functioning properly, or a core component is no longer functional. Work can continue in an acceptable capacity with sufficient workaround.	24 hours	Daily	8 hours
3	Medium	System is functioning according to design specifications with non-critical component issue. Issue identified with an acceptable workaround until resolution. Bug fixes or non-priority incidents.	24 hours	Monthly	5 business days or next release
4	Low	Non-critical errors with minor disruption but not impacting workflow. Workarounds exist.	24 hours	Monthly	10 business days or next release

4.2.2. Mandatory Project Requirements - The following mandatory requirements relate to the goals and objectives and must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it will comply with the mandatory requirements and include any areas where its proposed solution exceeds the mandatory requirement. Failure to comply with mandatory requirements will lead to disqualification, but the approach/methodology that the vendor uses to comply, and areas where the mandatory requirements are exceeded, will be included in the evaluation score where appropriate. The mandatory project requirements are listed below.

4.2.2.1. Delivery date of fully developed centralized voter registration system and campaign finance reporting portal shall be by December 31, 2025: *Provided*, that an earlier delivery date shall receive greater points, with the earliest delivery date of July 1, 2025, being the earliest delivery date to receive maximum points allotted for this subsection.

Based on a review of your requirements and your desire to establish a rapid timeline for deployment, we are confident a 10-week implementation for the **ReFrame Disclosure** system with go live data to run concurrently with a 30-week implementation for the **ReFrame Elections** solution is best to achieve a successful deployment and ensure all of your requirements are fulfilled.

4.2.2.2. By date of full deployment, systems should satisfy all required base

specifications as provided in Attachment B, which is an exhaustive list of mandatory features. Additional features that are relevant for Agency consideration may be added to the Attachment B document after all listed features, but are not required; failure to provide additional features will not result in a points reduction for this item. However, if on the date of deployment (i.e. partial or early deployment), if any features will not be available on that date, such shall be noted in Attachment B and indicate the estimated delivery date of the specific feature. Be advised that points will be deducted for delivery of mandatory features after the delivery date, even if the later-delivered mandatory feature(s) are prior to the latest acceptable delivery date of December 31, 2025.

We propose a 10-week implementation for the **ReFrame Disclosure** solution with go live data to run concurrently with a 30-week implementation for the **ReFrame Elections** solution, to ensure both systems are fully functional and meet all of the Agency's requirements.

- 4.2.2.3. Proposals shall provide a timeline of full deployment that considers and includes sufficient time for all data conversion and all testing.

Task Name	Duration	Start	Finish
WVSOS CFIS-EMS	2088 days	Mon 4/14/25	Wed 4/13/33
Phase I - Initiation and Planning	10 days	Mon 4/14/25	Fri 4/25/25
Consolidated Project Plan Finalized	5 days	Mon 4/14/25	Fri 4/18/25
Consolidated Technical Plan Finalized	5 days	Mon 4/14/25	Fri 4/18/25
Initial Project Schedule Finalized	5 days	Mon 4/14/25	Fri 4/18/25
Setup and Configure Development and Test for Gap Analysis	5 days	Mon 4/14/25	Fri 4/18/25
Project Kickoff Meeting	1 day	Mon 4/21/25	Mon 4/21/25
WVSOS Review/Approve Project Plan, Technical Plan, and Schedule	5 days	Mon 4/21/25	Fri 4/25/25
Deliverable 1 - Project Kickoff Meeting	0 days	Mon 4/21/25	Mon 4/21/25
Deliverable 2 - Project Management Plan, Technical Plan, and Schedule	0 days	Fri 4/25/25	Fri 4/25/25
Phase II - Initial Requirements Validation and Setup (Sprint 0)	10 days	Mon 4/14/25	Fri 4/25/25
Configure System & Development Environments for Sprint 1	10 days	Mon 4/14/25	Fri 4/25/25
Gap Sessions (Iteration #1)	10 days	Mon 4/14/25	Fri 4/25/25
Create Azure DevOps User Stories	10 days	Mon 4/14/25	Fri 4/25/25

Deliverable 3a - Gap Sessions (Iteration #1)	0 days	Fri 4/25/25	Fri 4/25/25
Phase III - Sprint Development (CF & EMS)	135 days	Mon 4/28/25	Fri 10/31/25
Executing Sprints (Agile Scrum Development)	135 days	Mon 4/28/25	Fri 10/31/25
Sprint 1 (Campaign Finance & EMS)	15 days	Mon 4/28/25	Fri 5/16/25
Sprint Tasks	15 days	Mon 4/28/25	Fri 5/16/25
System Initial Component Build	15 days	Mon 4/28/25	Fri 5/16/25
Retrieve User Stories from Backlog	15 days	Mon 4/28/25	Fri 5/16/25
Assign User Story Items to Scrum Teams	15 days	Mon 4/28/25	Fri 5/16/25
Conduct Daily Sprint Standups (15 mins)	15 days	Mon 4/28/25	Fri 5/16/25
Code User Story Items	15 days	Mon 4/28/25	Fri 5/16/25
Create User Story Test Scripts & Test Data	15 days	Mon 4/28/25	Fri 5/16/25
Test User Story Items	15 days	Mon 4/28/25	Fri 5/16/25
Debug User Story Items	15 days	Mon 4/28/25	Fri 5/16/25
Sprint 2 (Campaign Finance & EMS)	15 days	Mon 5/19/25	Fri 6/6/25
Repeat Sprint Tasks	15 days	Mon 5/19/25	Fri 6/6/25
Initiate Regression Testing	15 days	Mon 5/19/25	Fri 6/6/25
Gap Sessions (Iteration #2)	10 days	Mon 5/19/25	Fri 5/30/25
Create Azure DevOps User Stories	10 days	Mon 5/19/25	Fri 5/30/25
Deliverable 3b - Gap Sessions (Iteration #2)	0 days	Fri 5/30/25	Fri 5/30/25
Phase IV (A) - Testing and Training (Release 1 - Campaign Finance)	15 days	Mon 6/9/25	Fri 6/27/25
UAT (Release 1 - Campaign Finance)	10 days	Mon 6/9/25	Fri 6/20/25
Conduct Training for Testers	1 day	Mon 6/9/25	Mon 6/9/25
Conduct UAT Testing	10 days	Mon 6/9/25	Fri 6/20/25
Resolve UAT Issues	10 days	Mon 6/9/25	Fri 6/20/25
Deliverable 5a - UAT Support (Release 1 - Campaign Finance)	0 days	Fri 6/20/25	Fri 6/20/25

Training (Release 1 - Campaign Finance)	10 days	Mon 6/16/25	Fri 6/27/25
Finalize Materials	5 days	Mon 6/16/25	Fri 6/20/25
Training	5 days	Mon 6/23/25	Fri 6/27/25
Deliverable 6a - Training Complete (Release 1 - Campaign Finance)	0 days	Fri 6/27/25	Fri 6/27/25
Phase V (A) - Go-live and Transition to Support (Release 1 - Campaign Finance)	6 days	Mon 6/23/25	Mon 6/30/25
Production Environment Configured	5 days	Mon 6/23/25	Fri 6/27/25
Finalize System Documentation	5 days	Mon 6/23/25	Fri 6/27/25
GO LIVE (Release 1 - Campaign Finance)	1 day	Mon 6/30/25	Mon 6/30/25
Deliverable 7a - Go-Live (Release 1 - Campaign Finance)	0 days	Mon 6/30/25	Mon 6/30/25
Sprint 3 (EMS Only)	15 days	Mon 6/9/25	Fri 6/27/25
Repeat Sprint Tasks	15 days	Mon 6/9/25	Fri 6/27/25
Continue Regression Testing	15 days	Mon 6/9/25	Fri 6/27/25
Sprint 4 (EMS Only)	15 days	Mon 6/30/25	Fri 7/18/25
Repeat Sprint Tasks	15 days	Mon 6/30/25	Fri 7/18/25
Continue Regression Testing	15 days	Mon 6/30/25	Fri 7/18/25
SPRINT DEMO 1 (EMS Sprints 1 - 3)	1 day	Mon 6/30/25	Mon 6/30/25
Gap Sessions (Iteration #3)	10 days	Mon 6/30/25	Fri 7/11/25
Create Azure DevOps User Stories	10 days	Mon 6/30/25	Fri 7/11/25
Deliverable 3a - Gap Sessions (Iteration #3)	0 days	Fri 7/11/25	Fri 7/11/25
Deliverable 4a - SPRINT DEMO 1 (EMS Sprints 1 - 3)	0 days	Mon 6/30/25	Mon 6/30/25
Sprint 5 (EMS Only)	15 days	Mon 7/21/25	Fri 8/8/25
Repeat Sprint Tasks	15 days	Mon 7/21/25	Fri 8/8/25
Continue Regression Testing	15 days	Mon 7/21/25	Fri 8/8/25
Sprint 6 (EMS Only)	15 days	Mon 8/11/25	Fri 8/29/25
Repeat Sprint Tasks	15 days	Mon 8/11/25	Fri 8/29/25

Continue Regression Testing	15 days	Mon 8/11/25	Fri 8/29/25
SPRINT DEMO 2 (Sprints 4 & 5)	1 day	Fri 8/29/25	Fri 8/29/25
Deliverable 4b - SPRINT DEMO 2 (EMS Sprints 4 & 5)	0 days	Fri 8/29/25	Fri 8/29/25
Sprint 7 (EMS Only)	15 days	Mon 9/1/25	Fri 9/19/25
Repeat Sprint Tasks	15 days	Mon 9/1/25	Fri 9/19/25
Continue Regression Testing	15 days	Mon 9/1/25	Fri 9/19/25
Data Conversion (EMS Only)	135 days	Mon 4/28/25	Fri 10/31/25
Review Data Conversion Requirements	10 days	Mon 4/28/25	Fri 5/9/25
Perform High Level Analysis of Legacy Sources and Data	10 days	Mon 5/12/25	Fri 5/23/25
Create Initial Data Mapping Document	15 days	Mon 5/26/25	Fri 6/13/25
Develop Conversion Script Packages	40 days	Mon 6/16/25	Fri 8/8/25
SIT Conversion	4 days	Tue 9/16/25	Fri 9/19/25
Data Pull	1 day	Tue 9/16/25	Tue 9/16/25
Execute Test Script Packages	1 day	Wed 9/17/25	Wed 9/17/25
Produce and Distribute Data Migration Results	1 day	Thu 9/18/25	Thu 9/18/25
Produce Exception Analysis Reports	1 day	Fri 9/19/25	Fri 9/19/25
UAT Conversion	4 days	Tue 9/30/25	Fri 10/3/25
Data Pull	1 day	Tue 9/30/25	Tue 9/30/25
Execute Test Script Packages	1 day	Wed 10/1/25	Wed 10/1/25
Produce and Distribute Data Migration Results	1 day	Thu 10/2/25	Thu 10/2/25
Produce Exception Analysis Reports	1 day	Fri 10/3/25	Fri 10/3/25
Production Conversion	3 days	Wed 10/29/25	Fri 10/31/25
Production Data Pull	1 day	Wed 10/29/25	Wed 10/29/25

Execute Data Script Packages	1 day	Thu 10/30/25	Thu 10/30/25
Produce and Distribute Data Migration Results	1 day	Fri 10/31/25	Fri 10/31/25
Phase IV (B) - Testing and Training (Release 2 - EMS)	35 days	Mon 9/22/25	Fri 11/7/25
Prepare for Final Demo and Conduct End-to-End Testing (Release 2 - EMS)	10 days	Mon 9/22/25	Fri 10/3/25
WSD Conducts SIT	10 days	Mon 9/22/25	Fri 10/3/25
SPRINT DEMO 3 (EMS Sprint 6 & 7)	1 day	Fri 10/3/25	Fri 10/3/25
Deliverable 4c - SPRINT DEMO 3 (EMS Sprint 6 & 7)	0 days	Fri 10/3/25	Fri 10/3/25
UAT (Release 2 - EMS)	25 days	Mon 10/6/25	Fri 11/7/25
Conduct Training for Testers	1 day	Mon 10/6/25	Mon 10/6/25
Conduct UAT Testing	24 days	Tue 10/7/25	Fri 11/7/25
Resolve UAT Issues	24 days	Tue 10/7/25	Fri 11/7/25
Deliverable 5b - UAT Support (Release 2 - EMS)	0 days	Fri 11/7/25	Fri 11/7/25
Training (Release 2 - EMS)	30 days	Mon 9/22/25	Fri 10/31/25
Finalize Materials	5 days	Mon 9/22/25	Fri 9/26/25
Training	20 days	Mon 10/6/25	Fri 10/31/25
Deliverable 6b - Training Complete (Release 2 - EMS)	0 days	Fri 10/31/25	Fri 10/31/25
Phase V - Go-live and Transition to Support (Release 2 - EMS)	6 days	Mon 11/3/25	Mon 11/10/25
Production Environment Configured	5 days	Mon 11/3/25	Fri 11/7/25
Finalize System Documentation	5 days	Mon 11/3/25	Fri 11/7/25
GO LIVE (Release 2 - EMS)	1 day	Mon 11/10/25	Mon 11/10/25
Deliverable 7b - Go-Live (Release 2 - EMS)	0 days	Mon 11/10/25	Mon 11/10/25
Maintenance and Support (SaaS)	1938 days	Mon 11/10/25	Wed 4/13/33
Year 1 - 5 Months after Go-Live	111 days	Mon 11/10/25	Mon 4/13/26

Year 2 - 12 Months	261 days	Tue 4/14/26	Tue 4/13/27
Year 3 - 12 Months	262 days	Wed 4/14/27	Thu 4/13/28
Year 4 - 12 Months	261 days	Fri 4/14/28	Fri 4/13/29
Year 5 - 12 Months	260 days	Mon 4/16/29	Fri 4/12/30
Option Year 6 - 12 Months	261 days	Mon 4/15/30	Mon 4/14/31
Option Year 7 - 12 Months	261 days	Tue 4/15/31	Tue 4/13/32
Option Year 8 - 12 Months	261 days	Wed 4/14/32	Wed 4/13/33

4.2.2.4. Agency shall be the sole owner of all data.

Agency always retains full ownership of all system data, documents, and images.

- 4.3. Qualifications and Experience:** Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems similar to those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives were and how they were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

Qualifications/Experience

ReFrame Solutions has extensive experience offering technology and services for state and local governments, including campaign finance and lobbyist, and election management solutions. We have built our teams from talented and customer-obsessed individuals. Our diverse team is composed of experienced project managers, business analysts, and subject matter experts who are highly capable, experienced domain experts, who support your staff from a base of knowledge and success.

This team has successfully deployed Campaign Finance solutions in four states, with a fifth on the way. Additionally, they have implemented or are implementing Voter Registration and Election Management systems in two states and have deployed similar modules to up to 30+ jurisdictions under their previous employment with another company.

The Agency can rely on our team for the following:

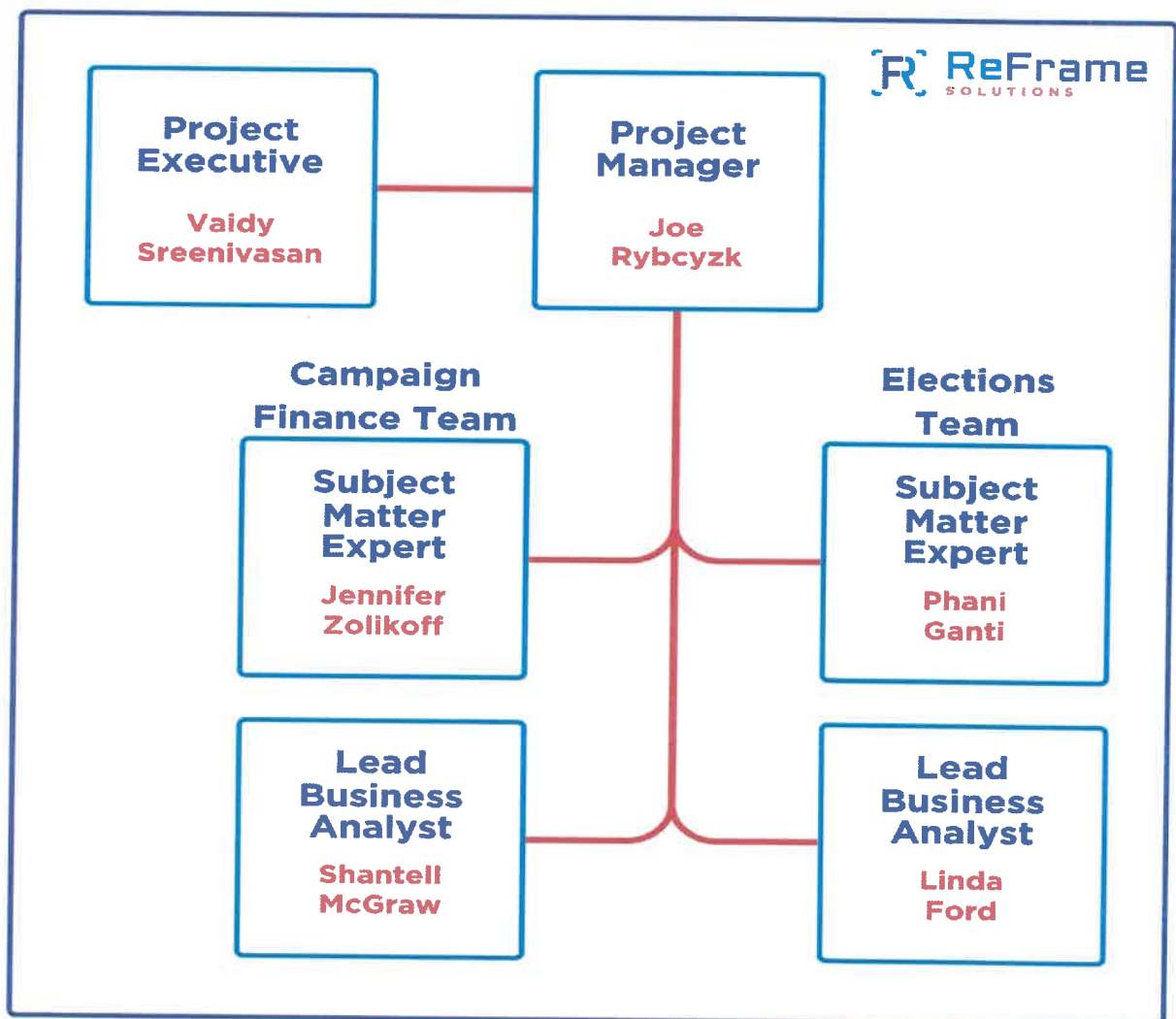
- Experienced Elections and Campaign Finance domain experts, and data structures to ensure low project risk and the unique ability to maintain your current system while

deploying your new one

- Unmatched experience from our customer obsessed team.

Staffing Plan

Our proposed team structure includes a project executive, project manager (overseeing both systems), as well as a training lead, subject matter expert, technical lead, and business analyst to manage and direct the two systems. Resumes for the team are included in Exhibit A and additional team members will provide support as needed. All work will be assigned and managed based on the predetermined key roles described and managed overall by the Project Manager (PM), who in concert with the Agency's PM, manages the hybrid Agile project to ensure all resources and information are available at the time they are needed for the project. The organizational chart below represents the team structure.



Past Projects and References**Reference 1 Name: Idaho Secretary of State****Contact Information:**

Name: Phil McGrane, JD, MPA, Idaho Secretary of State

Number: 208.332.2813

Address: 700 W. Jefferson ST, E205, Boise, ID 83702

Email: pmcgrane@sos.idaho.gov**Alternate Contact if Secretary McGrane is not available:**

Name: Nicole Fitzgerald, Chief Deputy Secretary of State

Number: 208.334.2300

Address: 700 W. Jefferson ST, E205, Boise, ID 83702

Email: nfitzgerald@sos.idaho.gov**Dates of Projects/Contracts: September 2023 - Present**

The Idaho Secretary of State contacted ReFrame in July of 2023 with an urgent need to replace their unstable legacy system prior to the 2024 Election Cycle. While a seemingly impossible task, The Agency was able to partner with ReFrame through an emergency sole source contract in early September, and ReFrame delivered the Campaign Finance Minimum Viable Product (MVP) to production in late December, in time for their first filing in January 2024. All subsequent filings have gone extremely well. It is rare that the Secretary himself would act as a reference, but he has expressed his extreme satisfaction in ReFrame to whoever will listen, and we hope the Agency will contact him. With the Campaign Finance MVP approach, followed by the Lobbyist implementation and enhancements later, the project very much mimics the Agency's need for an expedited timeline and its success to date should give comfort in our ability to deliver. The Lobbyist module already exists as a consolidated component of our core system, but we will begin a 3 – 4-month configuration effort in April and therefore have yet another solution in production prior to the Agency beginning your Phase II Lobbyist Disclosure efforts in 2025.

Reference 2 Name: Arkansas Secretary of State**Contact Information:**

Name: Leslie Bellamy, Director of Elections

Number: 501.683.3721

Address: 500 Woodland St., Room 026, Little Rock, AR, 72201

Email: leslie.bellamy@sos.arkansas.gov**Dates of Projects/Contracts: June 2023 - present**

This contract was awarded to ReFrame Solutions in August 2022 and kicked off shortly thereafter, with a hard requirement for delivery of the Campaign Finance functionality to be accomplished in time for the 2024 Presidential Election Cycle. The primary drivers of the procurement were to improve functionality and user friendliness of the filing systems, improve operational efficiency, and

improve public-facing functionality and public access to data. Having planned to use our team's vast experience over 20+ years in the Campaign Finance/Lobbyists/SFI field to re-enter the SOS/DOS market with the newest, most modern solution for 2023, development of our new system had already begun prior to the award of the Arkansas SOS contract. Being able to bring pre-developed product code to our sprint cycles helped to launch the project very successfully, months before the 2024 Election year in order to allow 2024 candidates to register. The Lobbyist module went live 2 months later, in time for the 2024 Legislative session. Our unmatched domain experience has contributed to the continuing success pace, and value pricing of this project. As the client will confirm, through the first few filing periods of the 2024 Presidential Election year, the performance of the system, enhanced features and ease of use, and the level of customer service provided by ReFrame, has exceeded expectations of both the State and the Filers themselves.

Reference 3 Name: New Hampshire Secretary of State**Contact Information:**

Name: David Lang, Chief of Staff

Number: 603.534.3642

Address: State House, 107 North Main Street, Room 204, Concord, NH 03301

Email: david.lang@sos.nh.gov**Dates of Projects/Contracts:** January 2021 - present**Campaign Finance Replacement**

We started the relationship with the New Hampshire Secretary of State by helping them rescue and maintain their legacy Elections, Campaign Finance (CF) and Business Registration systems when a well-known competitor stopped providing acceptable customer service. In February of 2023 the SOS conducted a competitive RFP for CF and ReFrame well outscored the field based on the up to 20+ years of CF experience of our team members and the fact that ReFrame has the most modern, secure, and user-optimized solution available on the market. We were contracted in August 2023, but due to the State's desire to avoid change prior to their early 2024 Primary, it went live in April 2024. The features of that solution are highly comparable to the needs of the Agency in this RFP, which provides another compelling example of why ReFrame should be considered the partner of choice.

Voter Registration and Election Management Replacement

ReFrame has been contracted to provide the design, development, and implementation of a new, highly secure, statewide voter registration system using our brand-new product optimized for security using the Azure Gov Cloud. The solution uses the same ReFrame platform that our Campaign Finance system is based on, the Agency can rest-assured that the architecture and design detailed in this RFP response can be trusted even under the harshest requirements for Elections Critical Architecture. The project is in UAT and went live in April 2024. The fact that the SOS is comfortable going live with a new elections system in the middle of a Presidential Election Year should highlight the confidence in the ReFrame customer support acumen and ease of use of our robust systems.

4.3.1. Qualification and Experience Information: Vendor should describe in narrative form how it meets the desirable qualification and experience requirements listed below.

4.3.1.1. Developing and maintaining voter registration systems and/or campaign finance systems in other jurisdictions. The narrative may include any relevant qualifications and experience including past and current projects, contracts, or professional experience.

Our state-of-the-art **ReFrame Disclosure** product includes Campaign Finance, Lobbyist, and Statement of Financial Interest. The solutions are live in production since 2023 for Arkansas (CF, Lobby, and SFI) and Idaho (CF), and in April 2024 for the State of New Hampshire (CF), and they have performed with the highest praise of these clients and their legislators/customers over multiple filing periods. The Lobbyist module for Idaho and the CF Module for the State of Vermont is in production as of January 2025.

4.3.1.2. Cooperating and working with other election system vendors for data import and export purposes, such as importing data files from campaign finance third-party filers or election definition files from voting system vendors, or exporting data files to election night reporting vendors.

We understand the importance of data migration and have a successful methodology proven in dozens of similar enterprise solutions, including many SOS implementations. We assign a dedicated data conversion team, under the direction of the project manager, and execute a data conversion plan that defines scope, roles, responsibilities, processes, tools, schedules, milestones, reporting mechanisms, and final acceptance criteria for the data migration sub-project starting Day1.

The system supports bidirectional communication with campaign finance and lobbyist module to ensure seamless data integration. For example, the Elections Management System pushes the candidates' information into campaign finance module as soon as a new election cycle is created.

The system provides secure APIs to import and export data with third parties. The solution also can handle importing and exporting external system data in different file formats (Fixed Width, Delimited, XML, JSON, etc.) using different communication methods like SFTP, FTP, HTTPS, secure REST API, etc.

Campaign Finance

This functionality is within our Statement of Financial Interest (SFI) Module which is typically provided at additional cost. We will provide as part of the proposed costs a single-format form matching that of the SFI available in PDF format on the Agency's website available to Candidate Filers ONLY through a link within their existing Campaign Portal Account. The filed document is available to the Filer and the Administrators in the Candidate's Documents Folder. The Public Portal displays the fact that the filer has filed a report along with the date filed, but the PDF will not be available online. The Public can make a request for a copy using a form/process similar to the current process. Any

advanced business rules, penalty processing, or need for users other than Candidates with Online Accounts already established in the new system will be analyzed and estimated for change control once final requirements are known.

Voter Registration

Voter participation on Election Day can be entered for individual voters, or in the Batch Voter History screen, or by scanning barcodes on the PollBook next to participating voters. Election Day Registration is the selected Registration Source so that the county elections staff can process EDRs. The system can also reopen the Voter Registration function online after the election date has passed.

The system can import election history files to process automatically. All the validation rules apply to this process as well and records that would error out because of these business rules show up in an error file. The solution displays records that have been processed successfully in a success file.

The system can import an election day registration file. These records show up on the reminder queue of the county user and they can be processed after review. Once the registration record is added in the solution, they are removed from the reminder queue.

- 4.3.1.3. **Cyber security and relevant industry standards, both (1) at the development stage for systems and (2) for ongoing maintenance and support. The narrative may include any relevant qualifications and experience of the vendor, its agent(s) assigned to the Agency, certifications, and system certifications that have been attained or received.**

ReFrame takes a holistic and immersive approach to security that is meticulously designed and continually updated by our team of in-house security specialists and specialty vendor-partners. Their mission is to keep the company, and the products secure in the face of modern data security and privacy challenges. The team utilizes policies, practices, system architecture, and software development techniques to maintain a security-first posture for our company's resources, services, and products. System security will meet and exceed the compatibility requirements of the Agency's existing policies and best practices for cloud-based development and hosting.

ReFrame is certified 100% Compliant for NIST 800-53 r5. We also do all development, data storage, and hosting using the SOC 2 Type 2 certified Microsoft Azure Cloud. As a company we are in the process of the SOC 2 pre-assessment, and the roadmap has ReFrame completing a SOC 2 Type 2 Audit and remediations by the end of 2025, prior to the Go-Live of the Agency's new solution. We continuously maintain and top-grade our security posture through the following activities:

SECURITY MEASURES	
Penetration testing	

Risk analysis
Regular backups and routine testing of those backups
Continuous staff training relative to current cyber threats and security best practices.
Vulnerability assessment and patching
Code review with an emphasis on security
Software Supply Chain Assessment
Encryption of application data in transit and at rest
Log review and assessment
Network and application segmentation
Incident response
Maintaining and testing the Business Continuity Plan
Third-party reviews and assessments for unbiased perspective

User Access

The solution infrastructure access is restricted to all personnel. It's important to note that all our company infrastructure and applications are hosted in secure cloud data center operations, and those providers take full responsibility for the management and operation of the data centers. As part of the shared responsibility model, Microsoft Azure is responsible for ensuring the physical security, climate control, and overall operational reliability of the data center facilities and their access.

Permissions

The solution supports role-based access allowing the Agency to determine permissions and authorization based upon your criteria and/or business rules. Tasks and functions are assigned to the roles along with different levels of permissions. These privileges and other system information, such as reference data and configuration parameters, are configured by the Agency's administrator. Access can be defined based upon the user's job role. Roles can be reflected in workflows and work queues, as well, with dashboards configured based on the users' assigned permissions.

Audit Architecture

Our organization conducts periodic risk and control assessments to ensure the effectiveness of our information security measures. We follow a regular schedule for these assessments, which include self-assessments, internal audits, and occasional external audits by third-party experts. This ensures that we prevent security breaches and comply with relevant regulations.

Self-assessments: We conduct self-assessments on a quarterly basis to continuously monitor and evaluate the performance of our security controls.

Internal audits: Our internal audit team performs comprehensive assessments annually to review our information security policies, procedures, and controls.

External audits: We engage external audit firms to conduct independent assessments biennially. These audits are performed to validate our security practices against industry standards and to ensure compliance with relevant regulations.

We follow a formal auditing process for all self-assessments, as well as internal and external audits. We have well established policies related to auditing and risk assessment/management based on NIST 800 series documentation and align with industry requirements and best practices. We use industry standard tools, like System Information and Event Managers (SIEMs), vulnerability scans, and Endpoint Detection and Response systems (EDRs) to monitor for unexpected or anomalous behavior in our environments. While our systems are continuously monitored with real-time alerts and weekly system log audits, our processes are reviewed at least annually. This helps us to maintain compliance with relevant regulations and ensure our processes are based on the latest guidance from the appropriate security frameworks.

Self-assessments: We conduct regular self-assessments to continuously monitor and evaluate the performance of our security controls.

Internal audits: Our internal audit team performs comprehensive assessments at least annually or when there is a significant change to a system to review our information security policies, procedures, and controls.

External audits: We utilize external audit firms to conduct independent assessments when appropriate. These audits are performed to validate our security practices against industry standards and to ensure compliance with relevant regulations.

4.3.2. Mandatory Qualification/Experience Requirements - The following mandatory qualification/experience requirements must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements. Failure to comply with mandatory requirements will lead to disqualification, but areas where the mandatory requirements are exceeded will be included in technical scores where appropriate. The mandatory qualifications/experience requirements are listed below.

4.3.2.1. Vendor or its agents assigned to this project have experience in developing and maintaining a voter registration system and/or campaign finance reporting system. The narrative may include any relevant qualifications and experience of the vendor, its agent(s) assigned to the Agency, and past projects or current contracts.

Our state-of-the-art **ReFrame Disclosure** product includes Campaign Finance, Lobbyist, and Statement of Financial Interest modules (suite of modules are chosen by each customer based on their needs). The solutions are live in production since 2023 for Arkansas (CF, Lobby, and SFI) and Idaho (CF), and in April 2024 for the State of New Hampshire (CF), and they have performed with the highest praise of these clients and their legislators/customers over multiple filing periods. The Lobbyist module for Idaho and the CF module for the State of Vermont is in production as of January 2025.

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

(Printed Name and Title) Catherine Fleming, Enterprise Sales Executive

(Address) 2 Waterside Crossing, Suite 301, Windsor, CT 06095

(Phone Number) / (Fax Number) 404.317.1165

(email address) catherine.f@reframesolutions.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

WSD Digital, LLC dba ReFrame Solutions
(Company) 

(Signature of Authorized Representative)
Anand Balasubramanian, Chief Executive Officer March 27, 2025

(Printed Name and Title of Authorized Representative) (Date)
844.473.3726

(Phone Number) (Fax Number)
anand@reframesolutions.com

(Email Address)

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6.8. Availability of Information: Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

WSD Digital, LLC dba ReFrame Solutions
(Company)

(Representative Name, Title)

844.473.3726
(Contact Phone/Fax Number)

March 27, 2025
(Date)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP SOS25*001

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

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

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

WSD Digital, LLC dba ReFrame Solutions
Company



Authorized Signature

March 27, 2028

Date

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

Exhibit A: Team Resumes

ReFrame provides the required resumes from Section 4.3 Qualifications and Experience.

Experience Highlights

- Vaidy is an experienced Subject Matter Expert skilled in product delivery, maintenance, and escalated tech support across product portfolios.
- Delivered the Corporations Filing System for the State of New York and has been involved in supporting several others

Number of Years: 17+

Education:

Master in Computer Management, University of Pune, Pune, India

Skills:

- Subject Matter Expert of ReFrame product portfolio
- Certified Scrum Master
- Technical and Functional Expertise in Product Delivery
- Deep knowledge in adoption and compliance of established reference development standards and policies

VAIDYANATH SRINIVASAN

Project Executive/Leader Secretary of State Practice



Professional Profile

With over 17 years in software development, Vaidy is the Vice President of Catalyst leading the ReFrame team responsible for our business services platforms. He is a subject matter expert of Campaign Finance and Election Management Systems with in-depth knowledge in its functional and technical architecture. He has delivered multiple systems across the nations. He has experience in both Project and Technical Management roles and is a Director-level Leader for ReFrame as well as his previous employer for 5 years prior.

Experience

ReFrame, Director of Projects:

Sep 2022 – Present

At ReFrame, Vaidy coordinates with DevOps, Architecture, Sales, Product Management and other internal teams. He is responsible for product delivery, maintenance, and escalated technical support across one or more products within Portfolio. He creates, updates, and ensures adoption and compliance with established Reference Development standards and policies. Vaidy manages all aspects of development including managing staffing as well as execution & performance management of development managers. He leads urgent response team to respond & resolve production issues. He partners with the Development Managers to plan to achieve overall development objectives.

At ReFrame, Vaidy drives the definition, communication, and adoption of development patterns and practices across product teams within portfolio. He drives the Managers to maintain high level velocity on their teams and hold development managers accountable. He is accountable for alignment of product development with the company's strategy, policies and standards. He is responsible for estimating the technical roadmap for products supporting the business unit. He discovers and exercise opportunities for reuse within and across portfolios.

Civix, Director of Development:

Sep 2018-Sep 2022

Vaidy successfully implemented the New York Corporations application in June 2021. One of the oldest and busiest state corporation applications to be replaced.

His other successful implementations accomplished:

- Ethics platform implemented for Georgia Government Campaign Transparency and Finance Commission (GGCTFC) – Jan 2021
- Ethics Platform implemented for New Mexico Secretary Of State Office. – Aug 2020
- Enterprise Registration and Licensing System implemented for West Virginia (WERLS) – Aug 2020

He partnered with the Architecture Review Board to own the Design, Plan, Build, and Support of one or more products in the business unit and was responsible for product delivery, maintenance, and escalated technical support across one or more products within Portfolio. He created, updated and ensured adoption and compliance with established Reference Development standards and policies and managed all aspects of development including managing staffing as well as execution & performance management of development managers.

Fiserv Inc., Team Lead - Software Development:

Oct 2012 – Sep 2018

Vaidy was SME for two of our biggest customer care applications. He was the • Key contributing member of the CPT (Core Product Team) that included interaction with Business users and management to decide scope of the project. He was the architect for technical solutions in the projects and provided estimates for the technical solutions for the functional requirements defined. He assisted with resource allocation and allocation of work. He was production support Lead for PartnerCare and FraudNet (Direct interaction with clients and Bank Account reps) and managed and oversaw deployment (quarterly software releases). Vaidy is an expert in secure coding practices. (Annual PCI compliance achieved).

Experience Highlights

- Project Manager
- Application Manager
- Business Analysis Manager
- Designer/Developer

Number of Years:

10+

Education:

Bachelor of Science
University of Connecticut

Technical Skills:

- Microsoft Office
- Microsoft Teams
- Rally
- Clarity PPM
- SQL
- PL/SQ
- Oracle Forms

Other Skills:

- Agile/SAFe, & Waterfall
- Scrum & Kanban
- Certified Scrum Master
- Vendor Management
- Change Management
- Process Improvement
- AWS Cloud Practitioner
- Leadership & Team Building
- Stakeholder Management
- Financial Management

Joe Rybczyk

Project Manager



Professional Profile

Joe is an experienced technical leader that has delivered large data conversions and application migrations/replacements in Agile and Waterfall environments. He uses his knowledge and skills to allocate optimal resources to drive results through significant change cycles, considering business value and team developmental needs. Joe strives to build cohesive, highly engaged teams and consistently achieves over 90% employee engagement scores as passionate servant leader known for honesty, transparency, and critical thinking.

Experience

ReFrame Solutions 2024 - present

Joe serves as a project manager for ReFrame Catalyst within the Corporations and Business services verticals. He provides oversight from kickoff to go-live ensuring an on-time and on-budget project. He works as the liaison between his customer and our teams.

The Hartford Financial Insurances Group Inc. 2017 – 2024

Managed 6 agile delivery teams comprised of 50-60 onshore / offshore resources supporting core claim processing and multiple technologies, including Guidewire, .Net, AWS, and PeopleSoft and functions for payment distributions, accounting, fraud investigation, specialty claims, litigation, and robotics. Partnered with product managers and finance resources to manage an organizational budget of ~\$6M.

MassMutual Life Insurance Company, 2013 - 2017

Oversaw team of business analysts reviewing, prioritizing, and staffing incoming project demand. Coached and developed talent to maximize career potential and performance. Determined salaries and bonuses, based on performance, budget, and market data. Focused on continuous improvement of employees and overall business analyst discipline.

Experience Highlights

- Phani is an experienced and certified Program, Portfolio and Project Manager skilled in Strategic Planning & Execution using Agile and Waterfall delivery methodologies.
- *Project Manager/BA for Original NHSQS SVRS Project*
- *Project Manager/ BA for Rhode Island and West Virginia SVRS projects*

Number of Years: 20+

Education:

Masters in Business Administration (MBA) with specialization in Financial Management

Skills:

- Rare mix of technical and business experience with a proven track record of dynamically adjusting approach to influence up, down and across organizational boundaries.
- Extensive experience partnering with Business and IT executives to develop, plan and deliver multi-year vision / roadmaps and capability enablement.
- Committed to professionalism, highly organized, able to see the big picture while paying attention to small details and excellent communication skills.
- Adept at assessing, re-aligning, and delivering high-risk, in-flight projects and programs on schedule & within budget.

Phani Ganti

Project Manager (PMP, SAFe Certified Scrum Master)



Professional Profile

Dynamic and results oriented leader with more than 20 years of progressive experience in directing & delivering transformational programs aligned with organizational priorities from concept through post implementation support.

Experience

ReFrame Solutions

July 2022 – present

Phani serves as a project manager for ReFrame Catalyst. She is an experienced and certified Program, Portfolio and Project Manager skilled in Strategic Planning & Execution using Agile and Waterfall delivery methodologies. She has more than 20 years of progressive experience in directing & delivering transformational programs aligned with organizational priorities from concept through post implementation support.

The Cimino Group @Travelers, Sr Project Manager:

March 2013 – Feb 2014

Provide program management support and portfolio oversight for major initiatives, technology modernization work and enhancements impacting Risk Management Information Services (RMIS). Responsible for creation of multi-year business strategies and Product Roadmap. Serving as the primary point of accountability to the stakeholders for execution and delivery of projects. Successfully delivered all projects by ensuring appropriate support across the organization

UnitedHealth Group, Project Manager:

June 2012- March 2013

Responsible for planning, executing, and implementing technical initiatives with significant scope that impacted multiple applications. Worked with Program and other Project Managers to identify specific areas of opportunity to address process inefficiencies and drive further alignment with industry best practices

Cognizant Technology Solutions

Sep 2005- June 2012

Acting as IT Project Manager successfully executed projects from Initiation through Post Implementation. Responsible for managing, planning, and executing more than one complex project at a time. Provided guidance, direction and leadership to project resources. Identified and negotiated schedules, milestones and resource needs required to meet project objectives. Helped resolve resource, schedule, cost and quality conflicts and worked closely with resource managers to ensure the project was sufficiently staffed with appropriate resources. Also provided status to Senior Leaders and kept them informed of risks and issues that threaten the health of the project

PCC Technology Group, Project Manager/Sr. Business Analyst:

03/04 – 09/05

Served as a Lead Business Analyst for Elections initiatives. Was responsible for customizing the product for various states to meet their voter registration rules & regulations. This position required working closely with business users, subject matter experts and IT Leads to drive out clear business processes and functional requirements to support large and complex initiatives.

Frontier Information Technologies Ltd, USA: Programmer Analyst:

07/01 – 03/04

Programmer Analyst for medium and large sized projects. Facilitated the JAD sessions and developed Business and Functional Requirement document. Worked with developers to translate functional requirements into technical specs in design and build phases. Worked closely with QA & end users in the testing phase and provided training support in post implementation phase.

Experience Highlights

- Subject matter experts in Elections with real-life experience in state elections division management.
- Experienced in determining requirements, leading GAP sessions, UAT and training functional specifications.
- User manual development
- Training curriculum development
- Highly experienced in recommending solutions to meet her customer's business objectives.

Number of Years:
10+

Education:

University of Georgia
Master of Science, Organic Chemistry

University of Georgia
Bachelor of Science Chemistry

Skills:

- Microsoft Office
- Azure DevOps
- JIRA

Linda Ford
Lead Business Analyst



Professional Profile

As a former state elections director, Linda is a key resource with business analysis and training coordination experience in three Statewide Voter Registration projects (including the original NH SVRS). She has created and executed training plans involving massive training coordination and execution responsibilities for States with up to 250 jurisdictions

Experience

ReFrame Solutions | Business Analyst | 2022-Present

Key Projects: New Hampshire Voter Registration/Election Management System, Vermont Voter Registration/Election Management System

- Reviewed business needs with New Hampshire Subject Matter Experts in GAP sessions.
- Wrote/reviewed business requirements for the New Hampshire Voter Registration System and Election Management System.
- Performed testing/provided feedback as modules were developed.
- Prepared training materials for state and local users.

PCC Technology Group | Business Analyst/UAT/Trainer | 2021-2024

Key Projects: Texas Voter Registration System, Connecticut Election Night Reporting, Alaska Election Management System, Texas Jury Management System

- Wrote business requirements for the Texas Jury Management System (JMS), focusing on state needs, legal requirements, technical functions, and value to the end user. Customer business needs required the Jury Management System to be implemented in a compressed timeline, 5 months from initiation to Go-Live.
- Performed User Acceptance Testing for Election Management Systems (EMS), Election Night Reporting (ENR) Systems, and Jury Management System.
- Trained users of various skill levels on web-based systems
 - Texas: Six hands-on, one-week classes for 150 election officials. Webinar training for 300 Texas county clerks. Presentation at Texas Annual Elections Seminar to approximately 700 election officials.
 - Connecticut: In-person training over 7 weeks to 800 local election officials.
- Developed user manuals (EMS, ENR, JMS) for end users at various levels across state and local governments.
- Designed webinar and in-person class content for web-based systems.
- Led coordination with the client to develop the implementation plan for web-based systems. In Connecticut, took 800 users from a paper-based system to a web-based election night reporting system.
- Provided technical assistance to Marketing Team with RFI/RFP responses

Director, Elections Division of the Georgia Secretary of State | 2011-2015

- Oversaw electoral process for over 500 state, county, and municipal elections annually.
- Over a three-year period, managed project implementation to move election systems from a mainframe platform to a web-based platform. The systems converted include a state-wide voter registration system, an election night reporting system, and a candidate qualifying system. Managed the change, including business requirements, timelines, UAT, training, and rollout to end users.
- Supervised 16 full-time staff members, emphasizing team communication, professionalism, individual development, and customer services.

Experience Highlights

- Jennifer is a certified Scrum Alliance product owner and in the full software development lifecycle (SDLC).
- Experienced in leading GAP sessions, creating wireframes and functional specifications.
- Managed multiple SOS transitions from legacy systems to Catalyst CFIS

Number of Years: 10+

Education:

Management Information Systems
Bachelor of Business Administration Ohio University, 1991-1995

Elementary Education
Post-baccalaureate Certificate
Rio Salado College, 2006-2008

Training Certifications

- PMC Level I - Foundations, Level II - Focus, Level III - Build, Pragmatic Institute
- Certified Scrum Product Owner, Scrum Alliance
- Certified Scrum Master, Scrum Alliance
- Enterprise Design Thinking Practitioner, IBM
- Global Knowledge Network's Essentials of Management

Skills:

- Azure DevOps
- Modern Requirements
- Microsoft Teams
- Microsoft Visio
- Microsoft Office Suite
- Camtasia

Jennifer Zolikoff

Product Owner/Consultant/Instructional Leader/Scrum Master



Professional Profile

A certified Scrum Alliance product owner with over ten years of experience, specializing in business analysis, agile processes, quality assurance, and training in the domains of Campaign Finance, Lobbying, and Education. Jennifer has a strong history of partnering with clients and cross-functional teams to understand client problems, elicit requirements, analyze business processes, and develop user stories to drive new feature development for software solutions. Additionally, she has designed multiple Ethics training programs and trained both clients and end users on campaign finance / lobbying / and statement of financial interest subject areas.

Jennifer has experience in the full software development lifecycle (SDLC) and has managed teams of both business analysts and quality assurance team members. She has led GAP sessions, created wireframes and functional specifications, acted as the liaison between the client and the development team, led functional, regression, and user acceptance testing phases, and created a full suite of end user documentation. Jennifer was a guiding force working with both New Mexico SOS office and Georgia Government Transparency and Campaign Finance Commission (GGTCFC) to transition off their legacy systems to a new Campaign Finance/Lobbying/Statement of Financial Interest system. She acts as an advocate for the client and prioritizes the backlog to ensure required functionality is delivered in a timely manner.

Experience

Director of Ethics and Disclosure

ReFrame Solutions | 2023 - Present

- Led efforts in ensuring organization integrity and transparency through the development and implementation of the Catalyst Disclosure Suite which consists of Campaign Finance, Lobbying, and Ethics Declarations.
- Product Owner in Catalyst providing consulting services to state projects, such as Arkansas, Idaho, New Hampshire, and Vermont.
- Tools: Azure DevOps, Teams, Visio, Office, Trello, Snag It, Camtasia

Product Manager

Civix (PCC Technology Group) | 2018 - 2023

- Product Manager of the Ethics Administration Platform which includes three modules: Campaign Finance Reporting, Lobbyist Disclosures, and Statement of Financial Interests.
- Lead Business Analyst/Product Owner in the Government Services Practice providing consulting services to state projects, such as California, New Mexico, Georgia, City of Aurora in Colorado.

Experience Highlights

- Subject matter experts in Campaign Finance and Elections with real-life experience at the state level.
- Experienced in determining documenting requirements, leading GAP analysis, creating user stories.
- Deep understanding of legislative and lawmaking process at the state level.
- Liaison between her customers and the development teams
- Highly experienced in recommending solutions to meet her customer's business objectives.

Number of Years:
20+

Education:
Pulaski Technical College-Little Rock
Associate of Science

Skills:

- Microsoft Office
- Azure DevOps
- JIRA
- Strong organization skills
- Grant writing

Shantell McGraw

Lead Business Analyst



Professional Profile

Shantell has 20+ years' direct experience in the Campaign Finance and Elections industry. As a former user of campaign finance and elections management systems, she brings an unmatched level of understanding and expertise required to implement your solution.

With project management experience implementing an online filing solution, Shantell knows the risks and how to mitigate them. Her overall experience in the public sector along with a strong work ethic make her the best choice to oversee and manage the team.

Experience

ReFrame Solutions | Business Analyst | 2024-Present

- Use problem-solving and organizational skills to ensure customers business requirements are met
- Lead GAP sessions to create functional specifications
- Act as liaison between customers and the development team.

Arkansas Secretary of State

Assistant Director of Election: March 2020 – July 2024

- Managerial skills that allow me to assist people with their needs, delegate tasks to coworkers, and follow proper instructions from my supervisors.
- Project manager for the new online filing portal Arkansas implemented in 2024.
- Grant writing experience.
- Managed a multi-faceted filing agency.
- Direct supervisor for 12 employees.
- Understanding the State of Arkansas's complex campaign finance filing schedule and guiding candidates on filing timely campaign reports.
- Working directly with the Arkansas Ethics Commission to meet the filer's needs.
- Advocated the Arkansas State Legislature for passage of election-related.
- Project manager for digitizing all records within the elections divisions.
- Experience in the RFP and RFQ process for the State of Arkansas.
- Knowledge in conducting vendor interviews after the RFP/RFQ process.

Election Coordinator: June 2013 – March 2020

- Direct liaison between the county elected officials and the Secretary of State's Office
- Extensive law research to aid the counties in conducting their elections.
- Led and conducted election-related trainings.
- Drafted task-specific guidance for counties.
- Manage 28 Arkansas counties and their elected officials.

Cascade County Elections

Elections Specialist: January 2007 – February 2013

- Managed all elections in the County under the supervision of the elected County Clerk and Recorder.
- Performed periodic poll worker training.

Cascade County Elections

Elections Representative: February 2001 – January 2007

- Assisted the County Clerk and Recorder in administering local and state elections.
- Managed the voter registration database

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Attachment B: Mandatory Features

CENTRALIZED VOTER REGISTRATION SYSTEM REQUIRED BASE SPECIFICATIONS

Summary:

The following pages outline the base specifications for the West Virginia centralized voter registration system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment. For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

Example:

Attachment to Attachment B Additional Information for Future Features

Y Voter Registration – system provides full functionality for authorized users with granted permissions by the Agency to register voters.

The system allows Agency to grant permissions to users, but will also allow Agency to grant certain users, such as county officials, permissions to add additional authorized users.

Note: We are providing a solution overview for the Attachment to Attachment B to further explain our offering.

Y, N, F

Features

I. Activities:

Y Voter Registration – system provides full functionality for authorized users with granted permissions by the Agency to register voters.

Y Duplicate Voters - system provides full functionality for authorized voters with granted permissions by the Agency to process voters with duplicate registrations, including merging voter records, copying all duplicate information into the surviving record, and audit history of each action taken on a voter record.

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CAMPAIGN FINANCE SYSTEM REQUIRED BASE SPECIFICATIONS

Summary:

The following pages outline the base specifications for the West Virginia campaign finance system. Using this form, bid proposals should be marked in the allotted space with "Y" for features that are available, "N" for features that are not available, or "F" for features that will be available upon final deployment.

For all features, if further information is necessary for the Agency to consider, please provide the information on a separate sheet attached to the response, which information is referenced directly to the specific feature. Be advised that the Agency does not seek additional information for all features, but only those that require additional information because the listed feature does not substantially encompass the available feature in the proposed system to be developed.

Example:

Attachment to Attachment B Additional Information for Future Features

Y Administrative users can set up transaction limits for support of system-assisted auditing functionality

The system can provide warnings to candidates based on transaction limits set by Agency, but the system will not prevent users from filing a report with a transaction that exceeds the limit. In that case, the system will notify Agency of the transaction that exceeds the limit.

Y, N, F

Features

I. Filing Schedule Administration:

Y Filing Schedules are set up and associated to specific filer types, so that the system may automatically assign appropriate schedules to registered candidates and committees.

Y The set up includes elections and elections cycles, filing cycles, reporting periods, report due dates, and optional reports. Reporting period templates may be established and used for multiple schedules as a shortcut.

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II. Limits & Thresholds:

- Y Administrative users can set up transaction limits for support of system-assisted auditing functionality.
- Y Warnings can be displayed to users when limits are exceeded, and audits can be saved for administrative use.
- Y Administrative users can set up reporting thresholds to support automatic supplemental report assignments. Examples of supplemental report requirements are transactions exceeding amount thresholds, exceeding aggregate thresholds, and/or are within a particular data range.

III. Penalty Administration:

- Y Administrators may create new penalty types and fee types and may maintain multiple fine schedules.
- Y Basic penalty accounting is available.
- Y Late filing penalty processing is integrated into the administrative functionality.
- Y Late filings are listed and penalties may be assessed to all at one time, or individually.
- Y In addition to late filings, administrators have the ability to set up any other types of violations for which they need to assess penalties, such as reports not in compliance with published requirements.
- Y Penalty payments or waived amounts may be entered against each penalty by the administrators in order for the system to track penalty balance.

IV. Administrative Tasks:

- Y The system generates notifications based on certain system events to alert administrators, who may need to follow up or do some other sort of tracking. Administrative tasks are:
 - Committee Change
 - Conditionally Accepted
 - Registration Update for Conditionally Accepted
 - Candidate Registration Amendment
 - Committee Registration Amendment
 - Financial Filing Amendment

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V. View Late Reports:

- Y Administrators may monitor late filers and view details of filers that are late with current or prior reports.
- F Public site maintains a list of late filers/noncompliant committees for a minimum of five (5) years.

VI. Code Table Maintenance:

- Y Administrators have the functionality available to add, update, and remove values from code tables that are used by the system in many capacities, such as providing for consistent data entry and supporting validation rules. Some examples are offices, districts, registration conditional acceptance or rejection reasons, uploaded image types, and user security questions.

VII. Image Processing:

- Y Administrators have the ability to upload electronic documents and associate them to a specific candidate or committee.
- Y The documents are viewable in the candidate's or committee's workspaces. Documents can be flagged as public or private – if public, a document is available to be viewed by the public through the system's public site.
- Y Certain system-generated correspondence such as registration confirmation letters are automatically imaged and appear in the candidate's or committee's document lists for viewing.

VIII. User Administration:

- Y User login accounts can be searched and modified for purposes of resetting passwords, emailing username and password information, activating or inactivating login permissions, and correcting contact information.
- Y New administrative users can be added when needed.

IX. Administrative Reporting:

- Y A tool for administrators to produce various ad hoc reports of candidates, committees, transactions, and filings will be provided.

X. Registration and Related Administrative Functions:

- Y Add Registration – candidates and committees who need to use the system for filing reports will be able to access the registration entry functionality in the public site.
- The entry page will contain all the information required by the state.

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Y When a registration is submitted, the user has a chance to view and print the registration information in the state's standard form.

Y Any forms, such as a signature card, that the user is required to sign and return can be printed at this time.

Y A confirmation email is sent to the filer when the registration is submitted.

XI. Independent Expenditure Committees:

Y Individual persons, business entities, and committees that make independent expenditures, and are required to file independent expenditure or other types of reports, can register in the system as this specific type of filer.

XII. Administrative Approval of Registration:

Y Pending registrations – from the administrative home page, a list of pending registrations is available at all times. These are registrations that have been submitted, but not yet accepted or rejected.

F The administrators may review each registration and can accept, conditionally accept, or reject the registration.

XIII. Accepting Registrations:

Y When the administrative user accepts a registration, that candidate or committee is now active in the system.

Y An acceptance letter is generated and emailed to each user.

 The system creates login credentials for the candidate and any committee officers designated to receive credentials.

Y Emails with the username and initial login instructions are sent to each user, and password is communicated securely in accordance with industry standards to allow the user to log into the Candidate/Committee Workspace.

F Filing dates and a list of scheduled reports will automatically be visible for each active candidate or committee.

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XIV. Conditionally Accepting Registrations:

- F The administrative user has the ability to conditionally accept a registration. Examples of when this may be used are: when they are waiting for the user to submit a registration amendment to correct a deficiency, or when they are waiting for a form to be returned.
- F Conditional acceptance does the same thing as a regular acceptance, with the exception that the candidate or committee is restricted from filing reports.
- F The administrative user must provide a reason for the conditional acceptance, and a letter is generated and emailed to each user.
- F A list of all registrations currently conditionally accepted is available at all times for monitoring and follow-up purposes. This includes functionality to remove the conditional status.

XV. Rejecting Registrations:

- Y The administrative user has the ability to reject a registration. The administrative user must provide a reason for the rejection, and a letter is generated and emailed to each user.

XVI. Registered Users Workspace:

- Y The Registered User Workspace Home page provides access to the following functionality:
 - Immediate To-Do: view system generated To-Do items when certain events occur, such as an upcoming deadline for a report that is not yet complete or filed, amending a transaction that requires an amended report to be filed, etc.
 - View upcoming reports
 - View recently filed reports
 - View reporting activity, such as running totals
 - View financial summary (current balance and unfilled transactions, summary totals for the current and past election or filing cycles)
 - View uploaded documents
 - View officer information and all registration information
 - Amend registrations
- Y Action Menu to navigate to functionality for Transaction Entry, Report Filing, Contributor/Payees/Loan Sources, and Data Import.

Transaction Entry:

- Y The Candidate/Committee Workspace has separate menu options for the user to access Contributions, Expenditures, Loans, and Debts functionality.
- Y In each area, the user may enter new transactions, and update or delete existing transactions.

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Y Once a transaction is included on a filed report and therefore accessible by the public, the transaction is considered "locked".

Y Updates or deletes after that point will require that the original report be amended.

Y As a financial transaction is entered and saved, it is considered unfiled data. As such, it is not available to be viewed on the public site, and can only be accessed through the filer's secure site by the candidate or committee to which it belongs, or by administrators.

Y Once the candidate/committee files a report, all transactions included on the report are considered filed and are available for view on the public site.

XVII. Transaction Types:

Y Contributions include the following categories, which are customizable:

- Itemized Monetary
- Itemized Nonmoney
- Non-Itemized Monetary
- Non-Itemized Nonmoney
- Interest
- Coordinated with other committee types

Y Expenditures include the following categories, which are customizable:

- Itemized Monetary
- Non-Itemized Monetary
- Itemized Monetary Contributions to Candidates and Committees
- Non-Itemized Monetary Contributions to Candidate and Committees
- Itemized Nonmoney Contributions made to Candidates and Committees
- Non-Itemized Nonmoney Contributions made to Candidates and Committees
- Itemized Administrative Expenses
- Non-Itemized Administrative Expenses
- Coordinated with Candidates and Committees

Y Loans include the following categories, which are customizable:

- New Loans
- Loan Payments

Y Debts include the following categories, which are customizable:

- New Debt
- Debt Payments

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XVIII. Contributor/Payees/Loan Sources:

- Y Candidates and committees maintain their own lists of contributors and payees.
- Y These can be reused for multiple transactions.
- Y These entities can be individuals, businesses or organization, registered candidates, and registered committees.
- Y They are entered as part of the transaction entry process.
- Y A separate function is provided for making updates to the entity's information.
- Y Existing transactions for these entities can be edited to include the new information, if appropriate.
- Y Aggregates can be calculated per contributor/payee as needed for reporting aggregate totals on the scheduled reports, or for use in validating contribution and expenditure limits.

XIX. Filing Reports and Report History:

- Y Regular scheduled reports - reports are listed in the order in which they are expected to be filed.
- Y When a user files a report, the system pulls all transactions within the reporting period, calculates contribution and expenditure summary totals, calculates the candidate's or committee's new cash balance, calculates loan and debt balances if these need to be reported, and presents the information to the user for review.
- Y The user has the option to preview the report (using the state's prescribed report form) before submitting the report.
- Y Once the report is submitted (filed), it appears in the filed report history list.
- Y All information contained in the report is immediately accessible to the public through the public access site.
- Y Reports can be amended anytime new transactions have been entered, or exiting transactions have been updated or deleted.
- Y Both the original versions of the report and all amendments are maintained and can be viewed.
- Y Without an administrator un-filing an amendment or the original version of a report, a history of all filed versions of the report will be maintained and viewable.

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XX. Supplemental Reports:

- Y A supplemental report is automatically added to a candidate's or committee's filing schedule after a transaction limit or threshold is met.
- Y These limits and thresholds are set up and maintained by administrators.
- Y Supplemental reports do not maintain a cash balance, and the transactions within the report will also be included on a regularly scheduled report in order to be shown in the correct reporting period where they have affected the cash balance.
- Y Supplemental reports are filed and amended in the same manner as regular reports.

XXI. Optional Reports:

- Y Optional Reports can be submitted on demand, rather than be scheduled by the system.
- Y Once filed, they will appear in the candidate's or committee's filing history.

XXII. Data Import:

- Y Transactions in Excel or XML files, using prescribed formats, may be uploaded directly into the system as an alternative to using the data entry pages.
- Y Third-party management companies with exportable data may import data as a bulk upload into the system using a standard template available in the system.

XXIII. Work on Behalf:

- Y Administrators may log into a candidate's or committee's workspace on behalf of that entity, and perform all functions in the workspace.
- Y They have the same capabilities in the Candidate/Committee Workspace that the registered users have.
- Y While working on behalf of a user, there is additional functionality for administrative users only to:
 - Correct registration information in place of a registration amendment.
 - Individually assign or remove filing schedules and one-time reports for candidates or committees.
 - Upload document images.
 - At the administrator's discretion, reports that cannot be filed yet, for technical or other reasons, can be administratively checked-in, so that they do not get flagged as a late filing.
 - Un-filing reports if deemed necessary.
 - Resetting user passwords, activate and inactivate user's login capability.

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- Activate or inactivate an officer's relationship and access to data for a candidate or committee.
- Maintain administrative notes pertaining to a candidate or committee – viewable only for administrators.

XXIV. Notifications:

Y The system provides for the following notifications and correspondence to be generated and emailed:

- Registration
- Confirmation of Registration Submission
- Registration Accepted
- Registration Conditionally Accepted
- Registration Rejected
- Send registration-related forms requiring signature
- User Credentials
- New User Credentials
- Provide Username to Existing User
- Provide Password to Existing User
- Filing Reminders and Confirmations
- Upcoming Report Due Reminder
- Notice of Unfiled Report
- Confirmation of Submitted Filing

XXV. Public Workspace:

Y The system provides a public site overview page serves as the home page for the system, that includes these features:

- Customized state banner
- Standard charts:
 - Top Expenditure Types with summary totals (bar chart)
 - Top Contributor Types with summary totals (wheel chart)
 - Independent Expenditures - Top Spenders with summary totals (top 5 list)
- Explore Candidate section
- Explore Committee section
- Search bar
 - Search for candidates, committees, offices using type-ahead names
 - Search for transactions using criteria such and filer type, amount thresholds, and date ranges.
 - View details of selected items from search results.
 - Action Menu to access other function.

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XXVI. Explore Capability:

- Y In addition to the quick Explore sections on the Home page, the action menu gives access to the complete Explore functionality, which allows for viewing lists of candidates, committees, filed reports, and offices.
- Y Lists can be filtered by various criteria, columns can be added or removed, and the lists can be exported. Drill down capability allows individual candidates, committees, filed reports, and offices in the list to be selected for viewing more detail.

XXVII. View Detailed Information:

- Y Candidate and Committee Detail includes general name, address, officer information, and a link to view the registration form.
- Y Summary financial totals for each election cycle or filing cycle in which the candidate or committee has filed reports is provided.
- Y Includes total contributions, expenditures, nonmonetary transactions, funds balance, and the top contributors and payees.
- Y Transactions are further summarized by type of contributor, expenditure category, and location (in-state, out of state, and city/town).
- Y PDFs of all filings can be viewed, including past versions if a report has been amended. All non-private uploaded documents and correspondence can be viewed.
- F Office Detail is used for overall and individual candidate comparison purposes. It includes the same financial summary information that is shown for individual candidates but is summarized to include all candidates running for the office.
- Y A comparison of financial information for each individual candidate that is running for the office.

XXVIII. Download Data:

- Y The public site provides CSV (comma-delimited) download files with filed contribution/loan and expenditure/debt data for each reporting year in a zipped file format.
- Y These files can be downloaded and imported into other applications (Microsoft Excel, Microsoft Access, etc.).
- Y Only filed transaction data is included in the download files.



Product Overview

ReFrame Solutions is a customer-centric digital technology company founded by information technology professionals with over 20 years of experience designing and developing solutions to drastically improve business process and customer experience, including the successful delivery of 11 State-wide Voter Registration Systems highlighting their resumes. With years of solution development experience, our passion creates digital transformation opportunities with the goal to help government agencies think about next-generation solutions and services and how they will bring new efficiencies and value to their organization.

Voter Registration System

By modernizing and streamlining the system, we know the true goal is not to re-invent the process of Voter Registration in the State, but to better administer, secure and deliver on the promises of this most critical democratic right. We offer intuitive improvements in UI/UX designs, modern data management techniques, and an improved use of GIS and modern tools like OCR to streamline the processes performed today.

The system provides, based on your requirements, all functionality needed by the State. This includes the ability to capture and display all required and optional fields in the voter registration record, assign a voter registration ID, set the voter registration status, and track voter registration condition codes. In addition, each voter's residence address is captured and used to assign the voter to districts and precincts, as well as to capture a mailing address if different. The system also can track critical dates, identify and resolve duplicate voter registration records and change political affiliations.

The system completely supports determining the voter's age as of an election, all of the unusual requirements of federal overseas voters/UOCAVA voters, and flagging a voter as requiring proof of ID. The system will allow users to process undeliverable and forwarded mail, as well as identifying a voter registration that is related to a request for an absentee ballot.



ReFrame Elections is a comprehensive system tailored to your requirements and offering an engaging user experience for your staff and constituents.

Solution Overview

Geographic Entities

This feature set includes the ability for the State to configure federal, state, municipal, and other districts in conformance with West Virginia's district maps and assign them to Individual Street or geographic area records such as Precincts. The system will also allow the State to set attributes for each Precinct. All street records will conform to the State's requirements and naming conventions. The system will allow users to view in reports, the number of registered voters for all districts, precincts and street records. Finally, the system will provide complete redistricting functionality (GIS & Manual) that will allow the state to plan, report on and implement changes to district assignments required as the result of changes in district maps.

District Type

Maintain County Data > District Type

Maintain District Type

District Type Code *

Description *

Office Type *

Display Order *

21

ADD

RESET

District Type Code is required

DISTRICT TYPE CODE	DESCRIPTION	OFFICE TYPE	DISPLAY ORDER	ACTIONS
CONG	CONGRESSIONAL DISTRICT	STATE	1	...
LEG	LEGISLATIVE DISTRICT	STATE	3	...
JUD	DISTRICT JUDGE	JUDICIAL	4	...
CEM	CEMETERY COMMISSIONER	COUNTY	5	...
CITY	CITY	COUNTY	6	...
COLL	COLLEGE TRUSTEE	COUNTY	7	...
FIRE	FIRE COMMISSIONER	COUNTY	8	...
CWD	COUNTY PRECINCT	COUNTY	9	...
HWY	HIGHWAY COMMISSIONER	COUNTY	10	...

Figure 1 Users can add/update and delete the district types.

Maintain Voting District
Maintain County Data > Maintain Voting District

Maintain Voting District

[ADD NEW DISTRICT](#)

District Type ▾

DISTRICT TYPE CODE	DISTRICT TYPE	DISTRICT NAME/NUMBER	DESCRIPTION	DISPLAY ORDER	STATUS	ACTIONS
CONG	CONGRESSIONAL DISTRICT	CNG D1		1	ACTIVE	⋮
CONG	CONGRESSIONAL DISTRICT	CNG D2		2	ACTIVE	⋮
JUD	DISTRICT JUDGE	JD4		14	ACTIVE	⋮
MAG	MAGISTRATE JUDGE	MJD4		20	ACTIVE	⋮
REP	STATE REPRESENTATIVE	REP 10		1	ACTIVE	⋮
REP	STATE REPRESENTATIVE	REP 14		2	ACTIVE	⋮
SSE	STATE SENATE	SS 10		1	ACTIVE	⋮
SSE	STATE SENATE	SS 14		2	ACTIVE	⋮
SSE	STATE SENATE	SS 15		3	ACTIVE	⋮

Figure 2 Users can add, update, or delete voting districts.

Maintain Voting District Assignment
Maintain County Data > Voting District Assignment

Maintain Voting District Assignment

[ADD NEW VOTING DISTRICT ASSIGNMENT](#)

Precinct ▾ Status ▾
ACTIVE ▾

VOTING DISTRICT ASSIGNMENT ↑	PRECINCT	CONG	LEG	REP	SSE	ACTIONS
001-1001-4	1001	CNG D1	LD10	REP 10	N/A	⋮
001-1001-6	1001	CNG D1	LD10	REP 10	ST 10	⋮

Figure 3 Users can add, update voting district assignments

Street Information
Maintain County Data > Street Information

Maintain Street Information ADD NEW STREET

Search Street Name
BENT LN X

STREET NAME	SIDE	LOW	HIGH	PRECINCT	CONG	LEG	JUD	CEM	CITY	COLL	FIRE	HWY	MAG	SCH	SEW	WTR	AMB	MOS	TCA	REP	AD	SSE	ZIP CODE
BENT LN	EVEN	220	220	1001	CNG D1	LD10	JD4	N/A	N/A	N/A	STAR FIRE	N/A	MJD4	WASD4	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	83668
BENT LN	ODD	851	1793	1001	CNG D1	LD10	JD4	STAR	CITY OF STAR	CW1	STAR FIRE	HD3	MJD4	WASD4	STAR	N/A	N/A	N/A	N/A	N/A	N/A	N/A	83669

Items per page: 50 1 - 2 of 2

EDIT STREET DELETE

Figure 4 Users can add/ update street details.

Add New Street
Maintain County Data > Street Information > Add New Street

Add New Street

Pre Direction Street Name Post Direction

Street Type ☐ Mailballot Precinct ☐ Rural Address

SELECT	SIDE	LOW	HIGH	PRECINCT	VOTING DISTRICT ASSIGNMENT	ZIP CODE	POSTAL CITY	COMMENTS
NO RECORDS FOUND...								

ADD RANGE DELETE RANGE SAVE & EXIT RESET CLOSE

Figure 5 Users can add new streets.

Update Street Range
Maintain County Data > Street Information > Update Street Range

Update Street Range

Search Street Name
BENT LN

Previous Street Name
BENT

SELECT	SIDE	LOW	HIGH	PRECINCT	VOTING DISTRICT ASSIGNMENT	ZIP CODE	POSTAL CITY	COMMENTS
<input checked="" type="radio"/>	EVEN	220	220	1001	001-1001-FIRE01-WAS	24701	CROSS GREEK	
<input type="radio"/>	ODD	951	1793	1001	001-1001-FIRE01-WAS	24701	CROSS GREEK	

Selected Voting Area Info

VOTING DISTRICT ASSIGNMENT	PRECINCT	CONG	LEG	JUD	CEM	CITY	COLL	FIRE	HWY	MAG	SCH	SEW	WTR	AMB	MOS	TCA	REP	AD	SSE	STATUS
001-1001-FIRE-WASD4-2	1001	CNG D1	LD10	JD4	N/A	N/A	N/A	FIRE 01	N/A	MJD4	WASD4	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	ACTIVE

VIEW BUSINESS ADDRESS VIEW VOTERS STREET NAME CHANGE STREET SEGMENT NAME CHANGE ADD RANGE DELETE RANGE SAVE RESET CLOSE

Figure 6 Users can update street range data.

ReFrame ELECTIONS DEMO

LOGOUT OF COUNTY AB001

Redistricting
County > GIS Redistricting > Redistricting - List

Redistricting

START NEW PROCESS

PROCESS NAME	INITIATED BY	SCHEDULED DATE & TIME	STATUS	ACTIONS
District 1 & 2 Expansion	AB001	11/26/2024 09:30:00 AM	Completed	

Items per page: 10 1 - 1 of 1

Figure 7 GIS redistricting view.

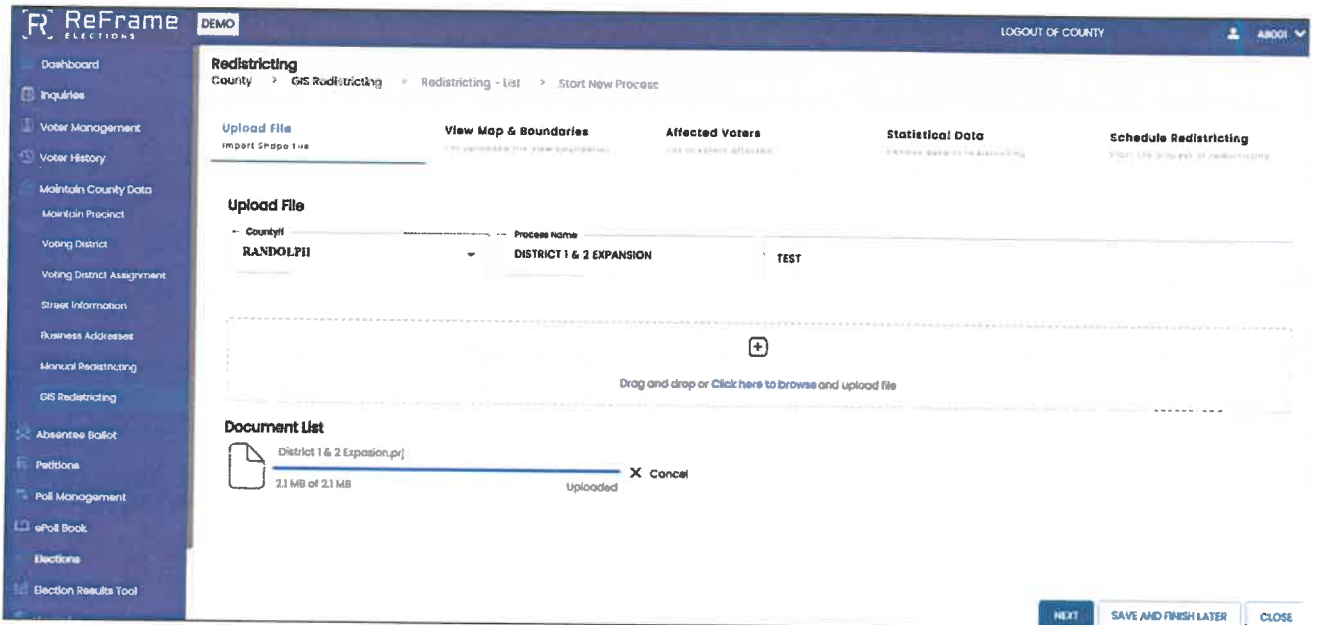


Figure 8 GIS redistricting workflow.

Voter Registration

The Voter Registration feature set includes the ability to capture and display all required and optional fields in the voter registration record, assign a voter registration ID, set the voter registration status, and track voter registration condition codes. In addition, each voter's residence address will be captured and used to assign the voter to districts, as well as to capture a mailing address if different. The system will also provide the ability to track critical dates, identify and resolve duplicate voter registration records and change political affiliations.

The system includes configurable Duplicate Check functionality at different levels. Every voter that is entered in the Voter Registration module undergoes a Duplicate check in the initial search using various criteria. All the matching records are displayed as the search results and User will be required to decide if it is a New or an Existing voter record.

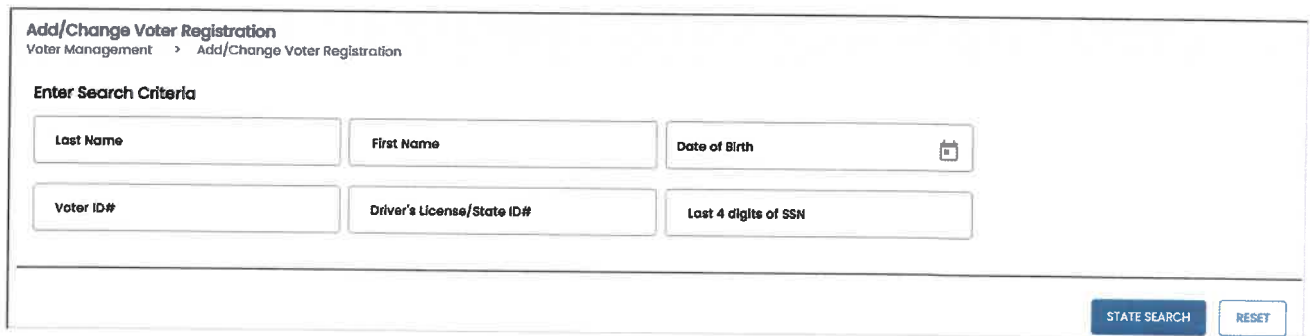


Figure 9 When adding a new voter, a statewide search for duplicate occurs.

New Voter Registration
Voter Management > Add/Change Voter Registration > New Voter Registration

Eligibility
Enter applicant's eligibility

Voter Information
Enter applicant's personal info

Address
Enter Residential, Mailing, Previous Details

Other Info
Enter applicant's other info

Registration Date * 

ⓘ Registration Date is required

Eligibility

Are you a citizen of the United States of America? ☐ Yes ☐ No

Will you be 18 or older on or before Election Day? ☐ Yes ☐ No

Have you ever been convicted of a felony? ☐ Yes ☐ No

I have been a resident of state for

Years Months

Figure 10 Add New Voter: Eligibility information

New Voter Registration
Voter Management > Add/Change Voter Registration > New Voter Registration

Eligibility
Enter applicant's eligibility

Voter Information
Enter applicant's personal info

Address
Enter Residential, Mailing, Previous Details

Other Info
Enter applicant's other info

Voter Information


First Name Middle Name Last Name Suffix

Confidential Voter ☐

Previous Name

First Name Middle Name Last Name Suffix

Voter Identification

Gender * Date of Birth *  Age

Driver's License/State ID# * Last 4 digits of SSN

Figure 11 Add New Voter: Voter information

New Voter Registration
Voter Management > Add/Change Voter Registration > New Voter Registration

Eligibility
Enter applicant's eligibility

Voter Information
Enter applicant's personal info

Address
Enter Residential, Mailing, Previous Details

Other Info
Enter applicant's other info

Residential Address

Street Name *

Street Number * Suffix House Fraction Number

Apartment / Unit Number Address Line 2 Address Line 3

State * Zip Code * Geo Code Latitude Geo Code Longitude

Mailing Address NOTE: If Mailing Address is same as the Residential Address, Please check this box ☐ Same as Residential Address

Street Number Suffix House Fraction Number Street Name / PO Box *

Apartment / Unit Number Address Line 2 Address Line 3 Postal City *

State/Territory * Postal Zip Code *

Figure 12 Add New Voter: Residential and mailing addresses

Previous Address

Street Number Suffix House Fraction Number Street Name / PO Box

Apartment / Unit Number Address Line 2 Address Line 3 City

State/Territory Zip Code

Political Party

Party Affiliation *

Contact Information

Phone Number Email ID

Type of Registration * Voter Status *

Form of ID - Proof of Identity

Form of ID Proof of Residence

Figure 13 Add New Voter: Other information

New Voter Registration

Voter Management > Add/Change Voter Registration > New Voter Registration

VOTER REGISTRATION REVIEW

Review Voter Information before saving.

Eligibility Enter applicant's eligibility	Voter Information Enter applicant's personal info	Address Enter Residential, Mailing, Previous Details	Other Info Enter applicant's other info
<p>Eligibility</p> <p>ARE YOU A CITIZEN OF THE UNITED STATES OF AMERICA? YES</p> <p>WILL YOU BE 18 OR OLDER ON OR BEFORE ELECTION DAY? YES</p> <p>HAVE YOU EVER BEEN CONVICTED OF A FELONY? NO</p> <p>I HAVE BEEN A RESIDENT OF WEST VIRGINIA FOR 2 YEARS 3 MONTHS</p> <p>REGISTRATION DATE 09/03/2026</p>			
<p>Voter Information</p> <p>NAME JENNY SANDERS</p> <p>CONFIDENTIAL VOTER NO</p>			

Residential Address	ADDRESS	220 BENT LN CROSS CREEK WV 24701
Voter Identification	GENDER FEMALE DATE OF BIRTH 01/01/1981 DRIVER'S LICENSE/STATE ID# WV1233265424 TYPE OF REGISTRATION IN-PERSON VOTER STATUS ACTIVE	
Political Party	PARTY AFFILIATION	UNAFFILIATED
Form of Id-Proof of Identity	FORM OF ID DRIVER'S LICENSE/ID CARD PROOF OF RESIDENCE APPROVED PHOTO ID	

PRECINCT	CONG	LEG	JUD	CEM	CITY	COLL	FIRE	HWY	MAG	SCH	SEW	WTR	AMB	MOS	TCA	REP	AD	SSE
1001	CNG D1	LD10	JD4	N/A	N/A	N/A	FIRE01	N/A	MJD4	WASD4	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

☒ Do Not Print Correspondence
 ☐ Send to Correspondence batch on Dashboard

MEMO

ADD


SAVE

EDIT INFORMATION

CLOSE

Figure 14 Review voter information

New Voter Registration
Voter Management > Add/Change Voter Registration > Voter Registration Complete


VOTER INFORMATION ADDED SUCCESSFULLY

Voter Name: JENNY SANDERS
Voter ID: 100002620

Print Documents

PRINT REGISTRATION CARD - NEW VOTER

PRINT REGISTRATION FORM - NEW VOTER

PRINT RESIDENTIAL ADDRESS LABEL

PRINT WALLET CARD

Scan / Upload Documents

Select the document type

SCAN DOCUMENT

UPLOAD DOCUMENT

GO TO VOTER SEARCH

Figure 15 Voter information added successfully

Duplicate Voter Search
Voter Management > Duplicate Voter Search

Duplicate Voter Search

Search Type

☒ Statewide ☐ County

Last Name: CURTIS First Name: PATTY Date of Birth: 

SEARCH RESET

Duplicate Voters

SELECT	STATUS	REGISTRATION DATE	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	RESIDENTIAL ADDRESS	VOTER ID#	COMPARE
<input type="radio"/>	REMOVED	01/04/2016	CURTIS	PATTY			09/08/1990	220 BENT LN ARCHER FL 83668	100002580	COMPARE
<input type="radio"/>	ACTIVE	12/02/2024	CURTIS	PATTY			09/08/1990	220 BENT LN ARCHER FL 83668	100002581	COMPARE

Figure 16 Duplicate voter search screen

Duplicate Voter Compare
Voter Management > Duplicate Voter Compare > Duplicate Voter Search Results > Compare Voter

Compare Voter

Compare Voter

VOTER 1

Voter ID#	100002580
Status With Reason	REMOVED - MOVED OUT OF JURISDICTION
Last Name	CURTIS
First Name	PATTY
Middle Name	
Suffix	
Driver's License/State ID#	ID7654321
Date of Birth	09/09/1990
Place of Birth	UNITED STATES
Domicile Address	220 BENT LN
Registration Date	01/04/2016

VOTER 2

Voter ID#	100002581
Status With Reason	ACTIVE
Last Name	CURTIS
First Name	PATTY
Middle Name	
Suffix	
Driver's License/State ID#	
Date of Birth	09/09/1990
Place of Birth	UNITED STATES
Domicile Address	220 BENT LN
Registration Date	12/02/2024

Memo

CHANGE

MERGE >>

<< MERGE

CHANGE

AUDIT HISTORY

ELECTION HISTORY

NAME HISTORY

ADDRESS HISTORY

NOT A MATCH

CLOSE

Figure 17 Duplicate voter compare screen

The system also completely supports determining the voter's age as of an election, all of the unusual requirements of federal overseas/UOCAVA voters, and flagging a voter as requiring proof of ID. The system will allow users to process undeliverable and forwarded mail, as well as identifying FPCA registration .

The system supports the capture and display of user profiles for all county voter registrars and clerks and track actions taken on voter registration records by these users. The system will comply with all NVRA, HAVA and State election laws relating to List Maintenance and will provide the capability to integrate with Vital Records, DMV, Department of Corrections.

The system provides complete scanning functionality and the ability to read bar codes. The system also clips the signature separately from any document and save the signature file in a non-proprietary format. ReFrame works with the State to configure reports using Jasper. Reports can be run in real time or scheduled to run at a pre-assigned date and time using

an asynchronous report queuing solution to avoid long processing delays for users running very large reports.

The system provides the ability for a voter who moves out of the State to request to have their voter registration cancelled and provide features to allow the State to share and compare voter registrations with other States, to ensure that voters are not registered in more than one state at any given time.

As a general matter, the State will be able to completely dictate its specific requirements, functionality, and features because ReFrame configures/develops the system to your specifications based on a core platform being developed and tested prior to the need for each module in a particular Sprint Cycle. From this perspective, ReFrame Elections offers the least risk in delivering a completely conforming product.

Template Manager

Template manager can be used to create any templates which can be used for correspondence or any batch jobs, we can make any email content configurable with the help of template manager.

Template Manager							
Correspondence > Template Manager							
Template Manager				<input type="text" value="Search Template"/>		ADD NEW TEMPLATE	
SELECT	TEMPLATE ID	TEMPLATE TYPE	TEMPLATE NAME	DATE CREATED	LAST MODIFIED	LAST MODIFIED BY	TEMPLATE STATUS
<input type="radio"/>	1	MULTI FACTOR AUTHENTICATION EMAIL	MULTI FACTOR AUTHENTICATION EMAIL	12/15/2023	12/15/2023	VP001	ACTIVE

Figure 18 Template Manager for correspondence.

Add New Template

Correspondence > Template Manager > Add New Template

Template Type *

VOTER VERIFICATION

Template Name *

UPLOAD

PREVIEW

Fields

Select Data Source

VOTER DETAILS

StateId

Registration Code

Last Name

First Name

Middle Name

Pin

Voter Name

Source

Paragraph

A

A²

A

A

B

I

U

S

X₂

X²

≡

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SAVE & PUBLISH

SAVE & DO NOT PUBLISH

CLOSE

Figure 19 Users can add a new template.

Inquiries

Inquiries

Inquiries > Voter Registration Search

Voter Registration Search

Search Type

Statewide

County

Voter ID#

Driver's License/State ID#

Voter Name

Current

Previous

Last Name

PARK

First Name

Date of Birth

Address

Current

Previous

County

Street Name

SEARCH STREET

SEARCH

RESET

Results

STATUS	VOTER ID#	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	RESIDENTIAL ADDRESS	PRECINCT	PARTY
SELECT	100000015	PARKER	CHRISTOPHER		JR	01/01/1987	810 N MIRA WAY CABIN CREEK WY 24761	1003	DEMOCRATIC

Figure 20 Voter inquiry criteria screen.

Inquiries						
Inquiries > Voter Registration Search > Voter Details						
Voter ID# 100000015	Voter Name CHRISTOPHER PARKER JR	Status ACTIVE	Registration Date 11/20/2024	Date of Birth 01/01/1997	Residential Address 810 N MIRA WAY CABIN CREEK WV 24781	Precinct 1003
<div> <div> Voter Details </div> <div> Voter Details </div> </div>						
<div> <div>Previous Name</div> <div>Previous Address</div> <div>Previous Party</div> <div>Election History</div> <div>Absentee Ballots</div> <div>Correspondence History</div> <div>Audit History</div> <div>Removal History</div> <div>Petition History</div> <div>View/Print/Upload Documents</div> </div>	<div> <div> <div>Voter Information</div> <div> Driver's License/State ID#: 123456789 Last 4 Digits SSN: Confidential Voter: NO Gender: MALE </div> </div> <div> <div>Address</div> <div> Residential Address: 810 N MIRA WAY CABIN CREEK WV 24781 Mailing Address: POB 555 GAINESVILLE FL 32702 </div> </div> </div>					
	<div> <div> <div>Other Information</div> <div> Current Party: DEMOCRATIC Type of Registration: ELECTION-DAY REGISTRATION Form of ID: DRIVER'S LICENSE/ID CARD Proof of Residence: APPROVED PHOTO ID Phone Number: 123-456-7891 Email ID: CHRISPARKER@MAIL.COM </div> </div> <div> <div>Voter Signature</div> <div>There is no signature to display</div> </div> </div>					

Figure 21 Voter inquiry: Voter details screen.

Election Management

The Election Management module includes Election Maintenance, Candidate Management, Polling Places, Poll Worker Management.

Maintain Elections

Elections > Election Management > Maintain Elections

ADD ELECTION

SELECT	ELECTION DATE - NAME	ELECTION TYPE	ELECTION CATEGORY	LAST DATE TO REGISTER	LAST DATE TO CHANGE PARTY	LAST DATE TO REQUEST ABSENTEE BALLOT
<input type="radio"/>	11/03/2026 - GENERAL ELECTION 11/3/2026	STATE GENERAL	STATE	10/10/2026	NA	10/29/2026
<input type="radio"/>	11/04/2026 - CONSOLIDATED ELECTION 11/4/2026	STATE GENERAL	STATE	10/11/2026	NA	10/24/2026
<input type="radio"/>	05/20/2025 - CONSOLIDATED ELECTION 5/20/2025	STATE GENERAL	STATE	04/26/2025	NA	05/06/2025
<input type="radio"/>	01/17/2025 - STATE GENERAL	STATE GENERAL	STATE	01/16/2025	NA	01/16/2025
<input type="radio"/>	11/05/2024 - GENERAL ELECTION	STATE GENERAL	STATE	11/05/2024	NA	11/05/2024

Items per page: 50 1 - 5 of 5

MODIFY COPY VIEW DELETE

Figure 22 Election Management: Maintain Elections

Add Election

Elections > Election Management > Maintain Elections > Add Election

Election Details

Election Date *

☒ State Election ☐ Local Election

* Election Date is required

Election Name *

Election Type *

General Election Date for this Primary *

Election Category *

☒ Partisan ☐ Non-Partisan

Last Date to Register * Last Date to Request Absentee Ballot *

Last Date to Change Party *

Party Closed/Open Primary

Democratic Party ☐ Open ☐ Closed

Republican Party ☐ Open ☐ Closed

SAVE RESET CLOSE

Figure 23 Election Management: Add Election

Add/Maintain Offices

Elections > Election Management > Add/Maintain Offices

ADD NEW OFFICE

SELECT	OFFICE NAME	OFFICE TYPE	DISTRICT TYPE
<input type="radio"/>	ATTORNEY GENERAL	STATE	STATE WIDE
<input type="radio"/>	COURT OF APPEALS JUDGE	STATE	STATE WIDE
<input type="radio"/>	DISTRICT JUDGE	COUNTY	COUNTY OFFICES
<input type="radio"/>	GOVERNOR	STATE	STATE WIDE
<input type="radio"/>	LEUTENANT GOVERNOR	STATE	STATE WIDE
<input type="radio"/>	PRESIDENT AND VICE-PRESIDENT OF THE UNITED STATES	FEDERAL	STATE WIDE
<input type="radio"/>	SECRETARY OF STATE	STATE	STATE WIDE
<input type="radio"/>	STATE CONTROLLER	STATE	STATE WIDE
<input type="radio"/>	STATE REPRESENTATIVE	STATE	STATE REPRESENTATIVE

UPDATE DELETE

Figure 24 Election Management: Maintain offices

Add Office

Elections > Election Management > Maintain Offices > Add Office

Add/Update Office

Office Name

Office Type

Term Length

District Type

Office/Ballot Sequence #

Vote for Not More Than

Acknowledgment Type

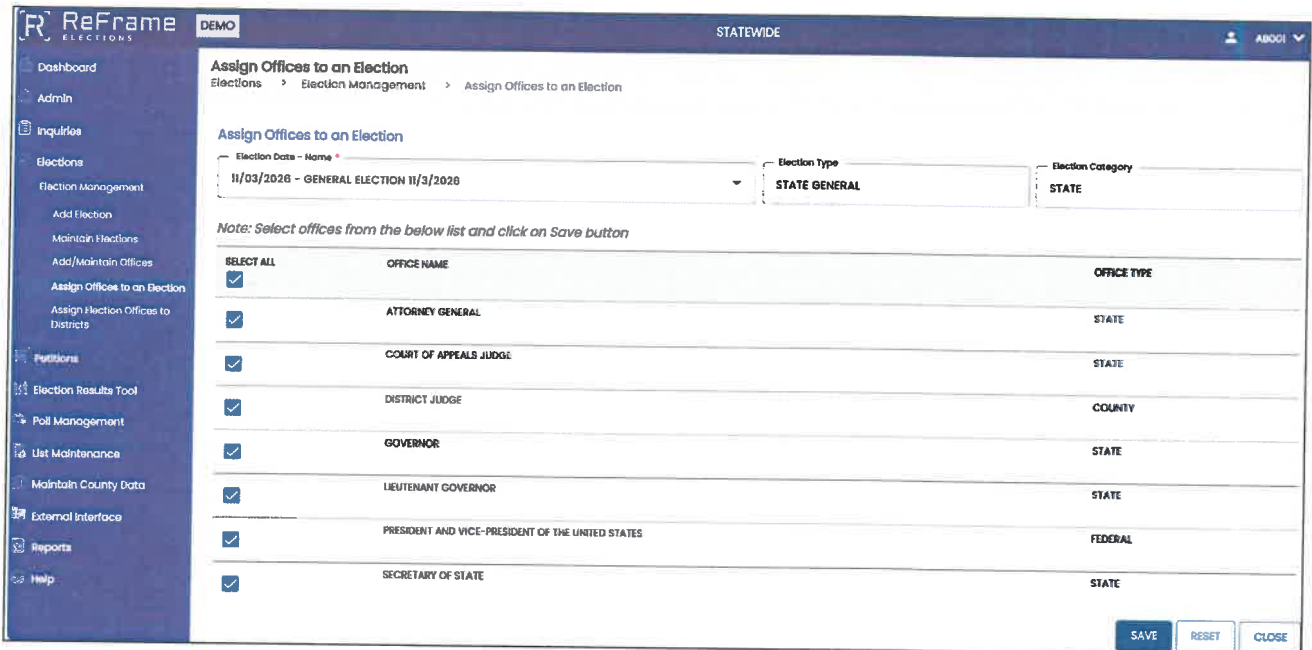
☐ At Large

☐ Candidates for this office can be entered by a Local User

☐ Allow Non-Registered Voters

SAVE RESET CLOSE

Figure 25 Election Management: Add/update office screen



Assign Offices to an Election

Elections > Election Management > Assign Offices to an Election

Assign Offices to an Election

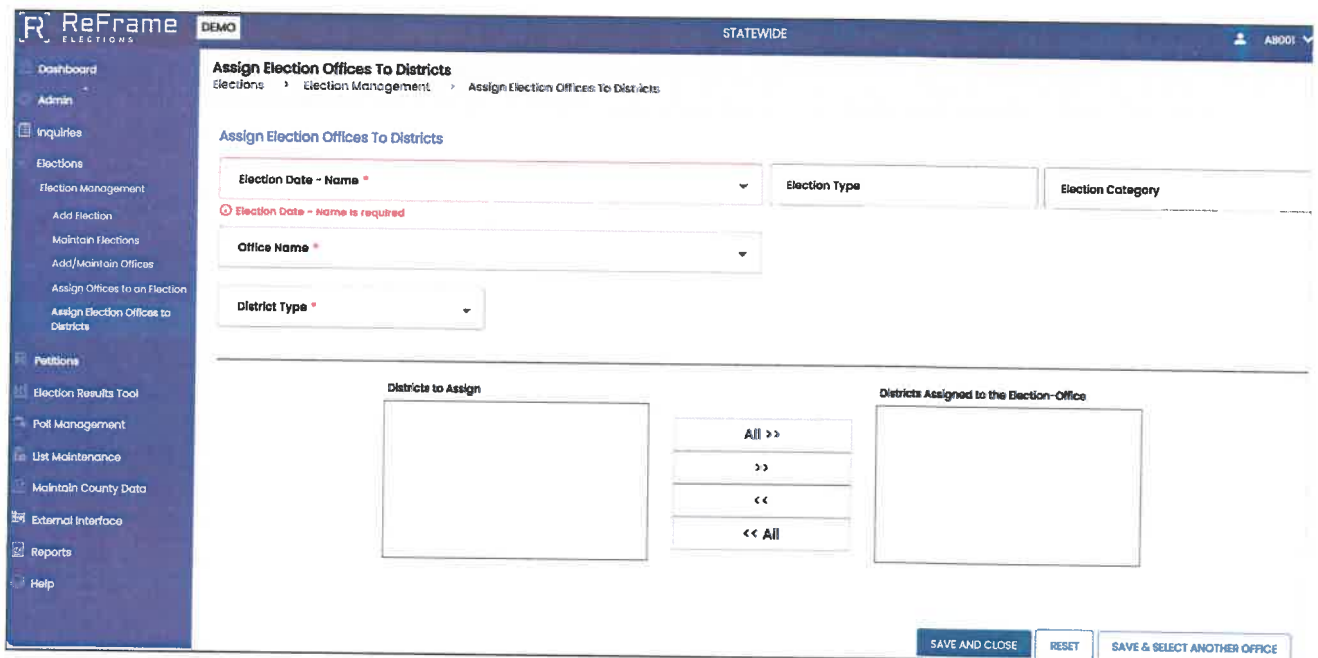
Election Date - Name * 11/03/2026 - GENERAL ELECTION 11/3/2026 Election Type STATE GENERAL Election Category STATE

Note: Select offices from the below list and click on Save button

SELECT ALL	OFFICE NAME	OFFICE TYPE
<input checked="" type="checkbox"/>	ATTORNEY GENERAL	STATE
<input checked="" type="checkbox"/>	COURT OF APPEALS JUDGE	STATE
<input checked="" type="checkbox"/>	DISTRICT JUDGE	COUNTY
<input checked="" type="checkbox"/>	GOVERNOR	STATE
<input checked="" type="checkbox"/>	LIEUTENANT GOVERNOR	STATE
<input checked="" type="checkbox"/>	PRESIDENT AND VICE-PRESIDENT OF THE UNITED STATES	FEDERAL
<input checked="" type="checkbox"/>	SECRETARY OF STATE	STATE

SAVE RESET CLOSE

Figure 26 Election Management: Assign offices to an election



Assign Election Offices To Districts

Elections > Election Management > Assign Election Offices To Districts

Assign Election Offices To Districts

Election Date - Name * Election Type Election Category

⚠ Election Date - Name is required

Office Name * District Type *

Districts to Assign Districts Assigned to the Election-Office

All >> >> << << All

SAVE AND CLOSE RESET SAVE & SELECT ANOTHER OFFICE

Figure 27 Election Management: Assign election offices to districts.

Candidate Management

ReFrame Elections can add registered voters, non-registered voters as candidates, search for existing candidates, maintain existing candidates.

ReFrame

ELECTIONS

DEMO

STATEWIDE

ADMIN

AB001

Dashboard

Admin

Inquiries

Elections

Partitions

Election Results Tool

Candidate Management

Add Candidate

Maintain Candidate

Election Night Summary

Poll Management

List Maintenance

Maintain County Data

External Interface

Reports

Help

Add Candidate - Registered Voter

Elections Results Tool

Candidate Management

Add Candidate - Registered Voter

Name	Residential Address	Party	Registration Date	Status	Voter ID#	Precinct
CHRISTOPHER PARKER JR	810 N MIRA WAY	DEMOCRATIC	11/20/2024	ACTIVE	100000015	1003

Candidate Information

First Name on Ballot

ENTER FIRST NAME ON BALLOT

Middle Name on Ballot

Last Name on Ballot

Suffix on Ballot

First Name on Ballot is required

Name as it appears on the Ballot

Write In

Mailing Address

Street Number

Suffix

House Fraction Number

Pre Direction

Street Name/PO Box

Post Direction

Apartment/Unit Number

Address Line 2

Address Line 3

Postal City

State

Zip Code

Candidate Mailing Address

Note: Enter if different from Voter Mailing Address

Street Number

Suffix

House Fraction Number

Pre Direction

Street Name/PO Box

Post Direction

Apartment/Unit Number

Address Line 2

Address Line 3

Postal City

State

Zip Code

Other Candidate Details

Date Filed

03/20/2025

Election Date - Name

Office

District

Candidate Type

Party of the Candidate

Other

Candidate Ballot Position

Candidate Status

Filing Status

ACTIVE

Add Hon. to Mailing Labels

Candidate Email

Candidate Phone Number

ISA on File

MEMO

ADD

SAVE

SCAN

UPLOAD

RESET

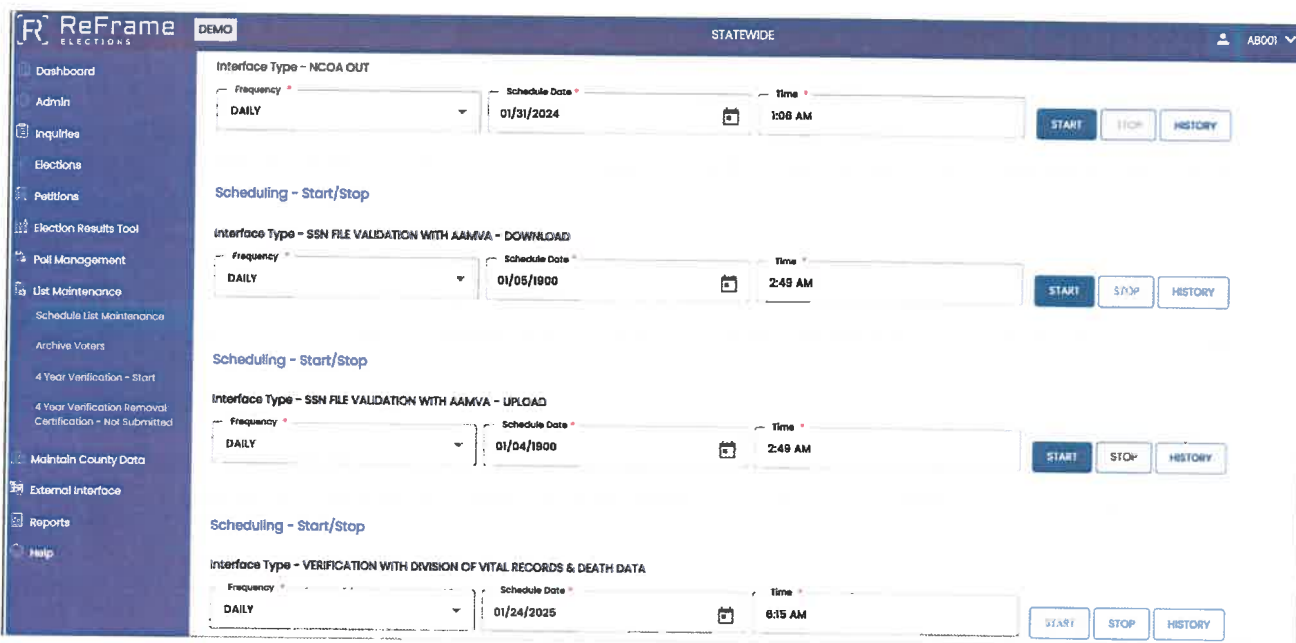
COPY SIGNATURE

CLOSE

VERIFY

Figure 28 Candidate Management: Add Candidate.

External Interfaces

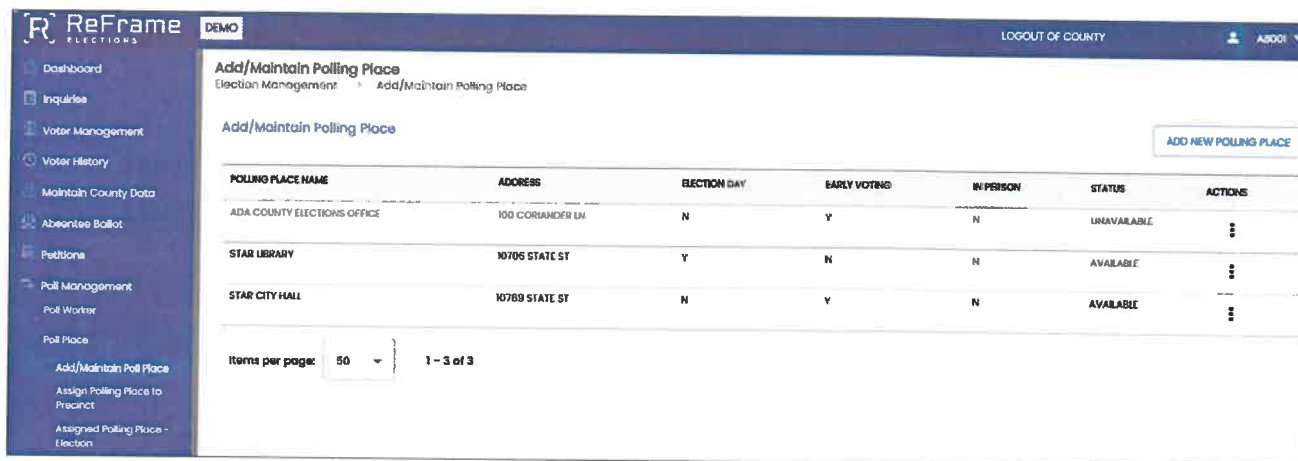


The screenshot displays the 'Scheduling - Start/Stop' section of the ReFrame Elections interface. It features a sidebar with navigation options like Dashboard, Admin, Inquiries, Elections, Petitions, Election Results Tool, Poll Management, List Maintenance, Maintain County Data, External Interface, Reports, and Help. The main content area is titled 'STATEWIDE' and shows three interface types for scheduling:

- Interface Type - NCOA OUT**: Frequency: DAILY, Schedule Date: 01/31/2024, Time: 1:00 AM. Buttons: START, STOP, HISTORY.
- Interface Type - SSN FILE VALIDATION WITH AAMVA - DOWNLOAD**: Frequency: DAILY, Schedule Date: 01/05/1900, Time: 2:49 AM. Buttons: START, STOP, HISTORY.
- Interface Type - SSN FILE VALIDATION WITH AAMVA - UPLOAD**: Frequency: DAILY, Schedule Date: 01/04/1900, Time: 2:49 AM. Buttons: START, STOP, HISTORY.
- Interface Type - VERIFICATION WITH DIVISION OF VITAL RECORDS & DEATH DATA**: Frequency: DAILY, Schedule Date: 01/24/2025, Time: 6:15 AM. Buttons: START, STOP, HISTORY.

Figure 29 Scheduling external interface files.

Polling Place and Poll worker



The screenshot displays the 'Add/Maintain Polling Place' section of the ReFrame Elections interface. It features a sidebar with navigation options like Dashboard, Inquiries, Voter Management, Voter History, Maintain County Data, Absentee Ballot, Petitions, Poll Management, Poll Worker, Poll Place, Add/Maintain Poll Place, Assign Polling Place to Precinct, Assigned Polling Place - Election, and Help. The main content area is titled 'LOGOUT OF COUNTY' and shows a table of polling places:

POLLING PLACE NAME	ADDRESS	ELECTION DAY	EARLY VOTING	IN PERSON	STATUS	ACTIONS
ADA COUNTY ELECTIONS OFFICE	100 CORNABANDER LN	N	Y	N	UNAVAILABLE	⋮
STAR LIBRARY	10706 STATE ST	Y	N	N	AVAILABLE	⋮
STAR CITY HALL	10789 STATE ST	N	Y	N	AVAILABLE	⋮

Below the table, there is a pagination control showing 'Items per page: 50' and '1 - 3 of 3'.

Figure 30 Polling Place Management: Polling place list.

Add Polling Place
Election Management > Add/Maintain Polling Place > Add Polling Place

Polling Place Information
Polling Details, Address Info

Polling Place
Polling Place Details

County Clerk
Contact Details

Moderator
Contact Details

Polling Place Information

Polling Place Name *

Memo

Address

Street Name *

SEARCH

Street Number *

Suffix

House Fraction Number

Street Name *

Apartment/Unit Number

Address Line 2

Address Line 3

County

Postal City *

State

Zip Code *

Phone Number

Fax Number

Polling Place Details

Poll Place Type *

Status *

Classification

EARLY VOTING, ELECTION DAY

AVAILABLE

LIBRARY

Local Election Start Time *

Local Election End Time *

State Election Start Time *

State Election End Time *

8:00 AM

8:00 PM

8:00 AM

8:00 PM

Polling Place Building Hours

☒ Has Power Back Up

☐ Has Generator

County Clerk Contact Details

Title

Last Name

First Name

Middle Name

ROSS

ALAYA

Suffix

Street Number

Suffix A

House Fraction Number

Street Name

12556

W NABESNA

Apartment/Unit Number

Address Line 2

Address Line 3

County

Moderator Contact Details

Last Name	First Name	Middle Name	Suffix
Street Number	Suffix A	House Fraction Number	Street Name
Apartment/Unit Number	Address Line 2	Address Line 3	County
Postal City	State	Zip Code	
Office Phone Number	Home Phone Number	Cell Phone Number	Fax Number
Public Email Id	Private Email Id		

[SAVE & ADD NEW](#)
[SAVE & CONTINUE](#)
[RESET](#)
[CLOSE](#)

Figure 31 Polling Place Management: Add polling place.

Update Accessibility Data

Election Management > Add/Maintain Polling Place > Update Accessibility Data

Accessibility Questionnaire

Accessibility Checklist

Polling Place Name: COUNTY ELECTIONS OFFICE

Polling Place Address: 100 CORIANDER LN

Accessibility Data

Note: Supported file Formats Excel, PDF, Word, PowerPoint, JPEG, TIFF & Max File size 40 MB

POLLING PLACE ACCESSIBILITY

NOTE: polling places must have the following accessibility requirements met:

WHEELCHAIR-ACCESSIBLE VOTING BOOTHS?

☒ Yes
 ☐ No
 ☐ N/A
 [SCAN](#)
[UPLOAD](#)

ENTRANCES AND DOORWAYS AT LEAST 32 INCHES WIDE?

☒ Yes
 ☐ No
 ☐ N/A
 [SCAN](#)
[UPLOAD](#)

Figure 32 Polling Place Management: Update accessibility data.

Assign Polling Place To Precinct
Election Management > Assign Polling Place To Precinct

Assign Polling Place To Precinct

Election Date - Name *
11/03/2026 - GENERAL ELECTION 11/3/2026

Polling Place *

Polling Place Type *

Precincts to Assign

All >>

>>

<<

<< All

Assigned Precinct

SAVE RESET

Figure 33 Polling Place Management: Assign poll place to a precinct.

Add/Maintain Inventory
Election Management > Add/Maintain Inventory

Maintain Inventory

Election Date - Name *

Election Date - Name is required

Polling Place *

Polling Place Address

Assigned Precinct

Add New Inventory

Inventory Name *

Quantity Needed *

Quantity on Hand *

SCAN UPLOAD

Note: Supported file Formats Excel, PDF, Word, PowerPoint, JPEG, TIFF & Max file size 40 MB

SAVE RESET CLOSE

Figure 34 Polling Place Management: Manage inventory.

Search/Add Poll Worker
Poll Worker > Search/Add Poll Worker

Poll Worker - Search for Existing

Last Name: PAR First Name: Voter ID#: Precinct:

SEARCH RESET

Poll Worker - Search Results

ADD POLL WORKER

SELECT	POLL WORKER AVAILABILITY	LAST NAME	FIRST NAME	MIDDLE NAME	SUFFIX	DATE OF BIRTH	RESIDENTIAL ADDRESS	VOTER ID#	PARTY	PRECINCT
<input type="radio"/>	ACTIVE	PARKER	CHRISTOPHER		JR	01/01/1987	810 N MIRA WAY	100000015	DEM	1003

Items per page: 50 1 - 1 of 1

UPDATE LINK TO A REGISTERED VOTER DELETE

Figure 35 Poll Worker Management: Search/add poll worker.

Figure: Poll Worker – Search/Add Poll Worker

Poll Worker Information			
Precinct	Precinct *		
1001	1001		
Voter Details			
Last Name	First Name	Middle Name	Suffix
PARSON	CHRISTOPHER		
Voter ID#	Voter Status	Poll Worker *	Date of Birth *
100002551	ACTIVE	NONE	01/01/1991
Residential Address			
Street Number *	Suffix	House Fraction Number	Street Name *
11			STAR RD
Apartment / Unit Number	Address Line 2	Address Line 3	Residing City/Town *
Postal City	State *	Zip Code *	
Mailing Address			
Street Number	Suffix	House Fraction Number	Pre Direction
Street Name/PO Box	Post Direction	Apartment/Unit Number	Address Line 2
Address Line 3	Postal City	State	Zip Code
Other Details			
Poll Worker Availability *	Party Affiliation	Driver's License/State ID#	Other Form of ID
	UNAFFILIATED	ID1234567	DRIVER'S LICENSE/ID CARD
Mobile Number	Work Phone Number	Home Phone Number	
Email ID	Preferred Contact Method		
Miscellaneous Details			
Position	Rate	Poll Worker Type	
Miscellaneous Details			
Position	Rate	Poll Worker Type	
<input type="checkbox"/> Oath of Office <input type="checkbox"/> W4 <input type="checkbox"/> Poll Worker is Elected Or County Employee			
Memo			
<div> <div>SAVE</div> <div>SAVE & ASSIGN ELECTION</div> <div>SAVE & ADD TRAINING DETAILS</div> <div>RESET</div> <div>CLOSE</div> </div>			

Figure 36 Poll Worker Management: Add/maintain poll worker.

Add/Maintain Positions
Poll Worker > Add/Maintain Positions

Add/Maintain Positions
ADD POSITION

SELECT	POSITION ID#	POSITION	RATE AMOUNT/HOUR	FLAT AMOUNT
<input type="radio"/>	01	CHIEF JUDGE	\$25.00	\$0.00
<input type="radio"/>	02	ISSUING CLERK	\$15.00	\$0.00
<input type="radio"/>	03	RECEIVING CLERK	\$15.00	\$0.00
<input type="radio"/>	04	VOTE AREA MONITOR	\$15.00	\$0.00

Items per page: 50 1 - 4 of 4

UPDATE DELETE VIEW POLL WORKERS

Figure 37 Poll Worker Management: Add/maintain positions & rates

Absentee Ballot and Early Voting Requirements

The system provides Absentee Ballot and Early Voting capabilities. This includes the ability to capture and display in one system all required and optional fields in the absentee ballot, early ballot and questioned ballot records. Absentee ballots shall support both by-mail and in-person voting and must support domestic and overseas voters (including UOCAVA). The system shall support requests for ballots for one or more election in the given year or for an election or for lifetime (if allowed in the state). Absentee and Early ballots shall reside in the same system as Voter Registration and allow the user to view and update the voter's registration data when processing the ballot. Additionally, the user can enter ballot-specific details per the State's requirements and determine whether the applicant is eligible to vote based on their party affiliation and flag a voter as a permanent absentee voter.

The system also interfaces with a third-party web application to allow voters to apply for and receive ballots electronically. When ballots are returned, they can be updated in the system and any ballots returned as undeliverable can be marked as such. The system will provide the ability to accept or reject or challenge ballots, with an associated reason. All history regarding the ballot shall be captured based on the State's requirements. The system will also provide warnings for a voter that has already voted in the election, is not actively registered when voting, or is registered in another County.

The system also supports the processing of Early Voting ballots, like absentee ballots. The system prevents voters from voting when they are not actively registered or are not registered in the county in which they are attempting to vote.

ReFrame works with the State to review, define and produce the appropriate number of ballot reports using SQL Server Reporting Services, in conformance with the detailed requirements to be gathered during Discovery. Reports can be run in real time or scheduled to run at a pre-assigned date and time.

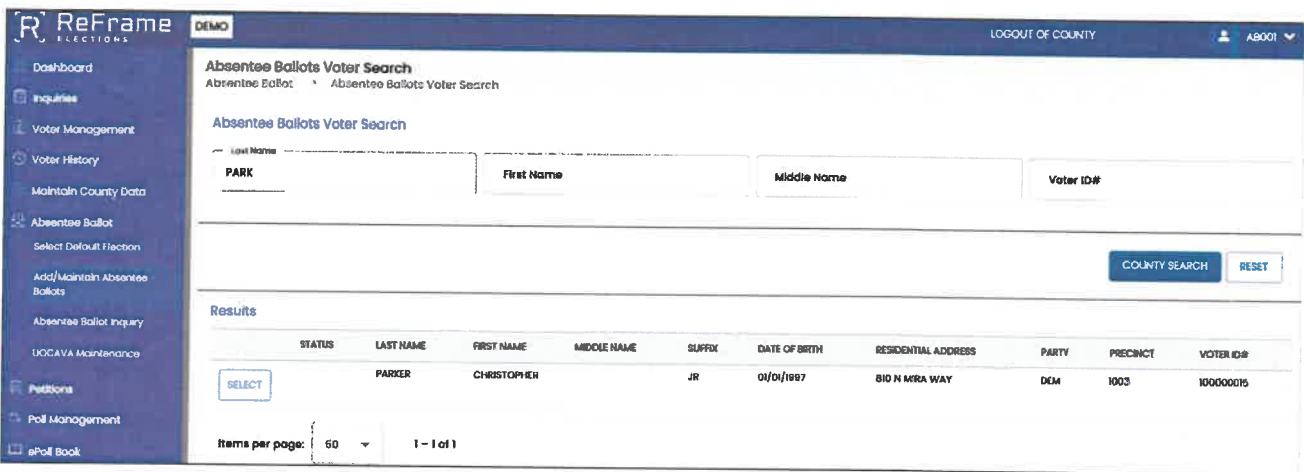


Figure 38 Absentee Ballot: Voter search.

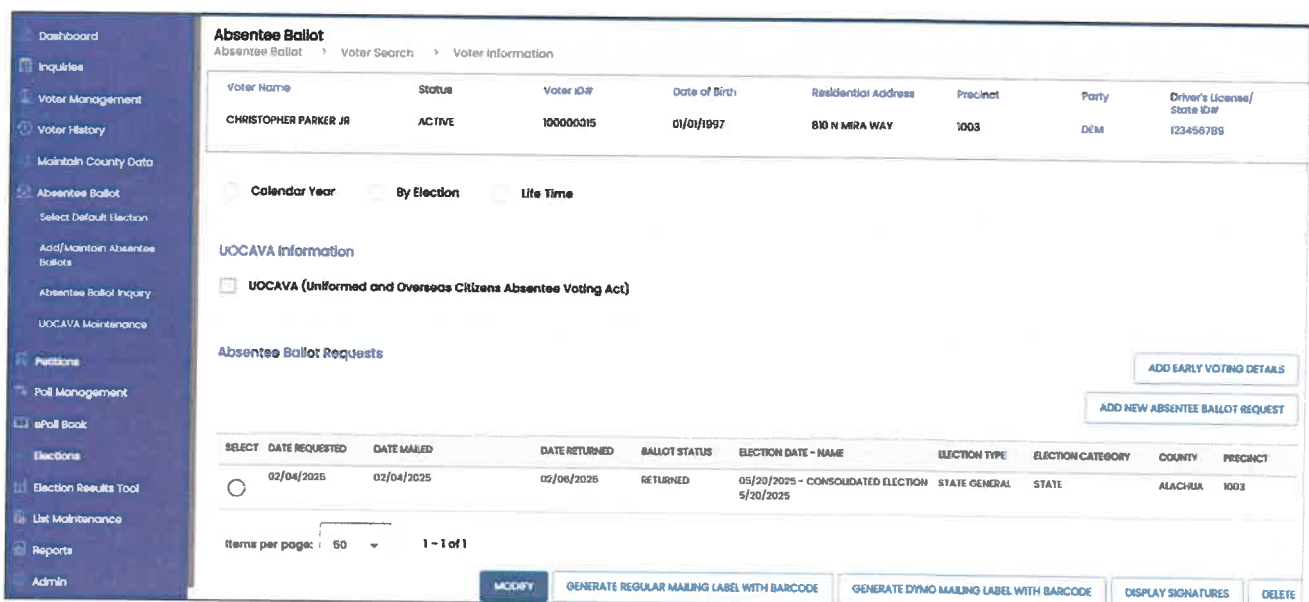


Figure 39 Add Absentee Ballot Request: Voter information.

Dashboard
Inquiries
Voter Management
Voter History
Maintain County Data
Absentee Ballot
Select Default Election
Add/Maintain Absentee Ballots
Absentee Ballot Inquiry
UOCAVA Maintenance
Petitions
Poll Management
ePoll Book
Elections
Election Results Tool
List Maintenance
Reports
Admin

Absentee Ballot

Absentee Ballot > Voter Search > Voter Information

Voter Name	Status	Voter ID#	Date of Birth	Residential Address	Precinct	Party	Driver's License/ State ID#
CHRISTOPHER PARKER JR	ACTIVE	100000015	01/01/1997	810 N MIRA WAY	1003	DEM	123456789

UOCAVA Information

☒ **UOCAVA (Uniformed and Overseas Citizens Absentee Voting Act)**

UOCAVA Start Date * UOCAVA End Date

☐ I am on active duty in the Uniformed Services or Merchant Marine.

OR

☐ I am an eligible spouse or dependent.

****If Military and/or spouse or dependent must select "Domestic" or "Overseas"**

☐ I am a U.S. citizen living outside the country, and I intend to return.

☐ I am a U.S. citizen living outside the country, and my intent to return is uncertain.

MODIFY
GENERATE REGULAR MAILING LABEL WITH BARCODE
GENERATE DYMO MAILING LABEL WITH BARCODE
DISPLAY SIGNATURES
DELETE

Figure 40 Add Absentee Ballot Request: Voter information, if UOCAVA

Add Absentee Ballot Request

Absentee Ballot > Voter Search > Voter Information > Add Absentee Ballot Request

Voter Name	Status	Voter ID#	Date of Birth	Residential Address	Precinct	Party	Driver's License/ State ID#
CHRISTOPHER PARKER JR	ACTIVE	100000015	01/01/1987	810 N MIRA WAY	1003	DEM	123456789

Election Date - Name *

ⓘ Election Date - Name is required

Request Date *

Request Type *

Date Mailed

Issued Type

Reason

Party Choice
DEMOCRATIC

Ballot Mailing Address

☒ USE RESIDENTIAL ADDRESS/HANDED TO VOTER

☐ USE MAILING ADDRESS

☐ USE ABSENTEE BALLOT ADDRESS

☐ USE ABSENTEE BALLOT EMAIL

Street Number
810

Suffix

House Fraction Number

Pre Direction
NORTH

Street Name *
N MIRA WAY

Post Direction

Apartment / Unit Number

Address Line 2

Address Line 3

City/UOCAVA (APO, FPO, DPO) *
CABIN CREEK

State/Territory/Province *
WEST VIRGINIA

Country *
UNITED STATES

Zip Code *
24701

Email ID

Ballot Return Information

Date Ballot Returned

Return Type

☐ Signature Verified

☐ Ballot Returned Undeliverable

Reason

☐ Spoiled

Spoiled Reason

☐ Rejected

Reject Reason

☐ Challenged

Challenge Reason

Challenged By

MEMO

ADD

Signature

There is no signature to display

SAVE

RESET

CLOSE

Figure 41 Add absentee ballot request.

Add Early Voting Details
Absentee Ballot > Voter Search > Voter Information > Add Early Voting Details

Voter Name	Status	Voter ID#	Date of Birth	Residential Address	Precinct	Party	Driver's License/ State ID#
CHRISTOPHER PARKER JR	ACTIVE	100000015	01/01/1997	810 N MIRA WAY	1003	DEM	123456789

Election Date - Name *

ⓘ Election Date - Name is required

Request Date * 03/20/2025 **Polling Place**

Date Mailed 03/20/2025 **Issued Type** INPERSON **Party Choice** DEMOCRATIC

Ballot Return Information

Date Ballot Returned 03/20/2025 **Return Type** INPERSON ☐ Signature Verified

☐ Ballot Returned Undeliverable **Reason**

☐ Spoiled **Spoiled Reason**

☐ Rejected **Reject Reason**

☐ Challenged **Challenge Reason** **Challenged By**

MEMO

ADD

SAVE RESET CLOSE

Figure 42 Early voting details.

Absentee Ballot Inquiry
Absentee Ballot > Absentee Ballot Inquiry

Absentee Ballots Voter Search

Election Date - Name * **Precinct**

ⓘ Election Date - Name is required

☒ Not Mailed ☐ Not Returned

SEARCH RESET

Figure 43 Absentee Ballot Inquiry: Note modified/not returned.

System Administration

The Voter Registration system performs real-time processing so that information is accessible to all counties and the State immediately upon saving in the database since all the municipalities' data resides in a centralized database. Accessibility privileges are controlled through user roles defined at county and state levels. These privileges and other system information such as reference data and configuration parameters are configured by the administrator.



Figure 44 System Administration: User maintenance.

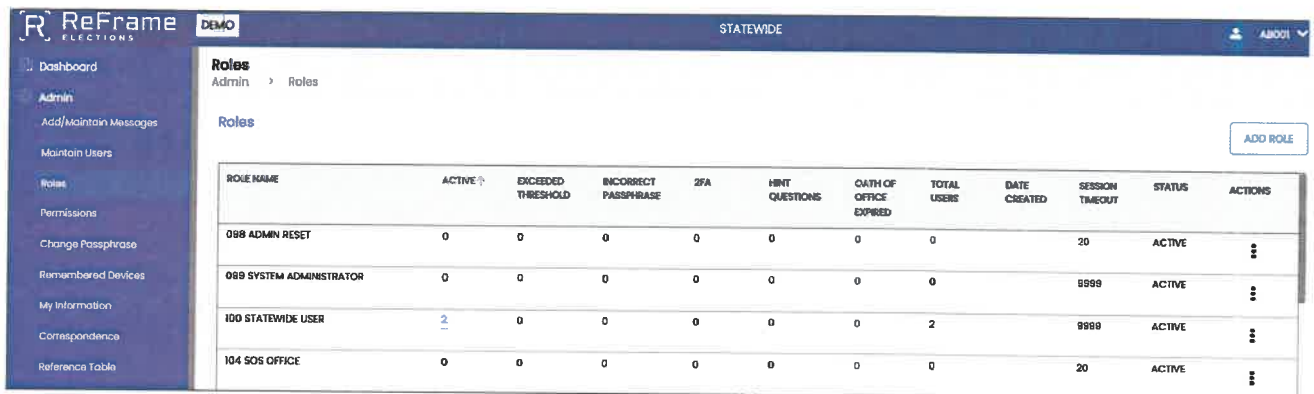


Figure 45 System Administration: Role maintenance.

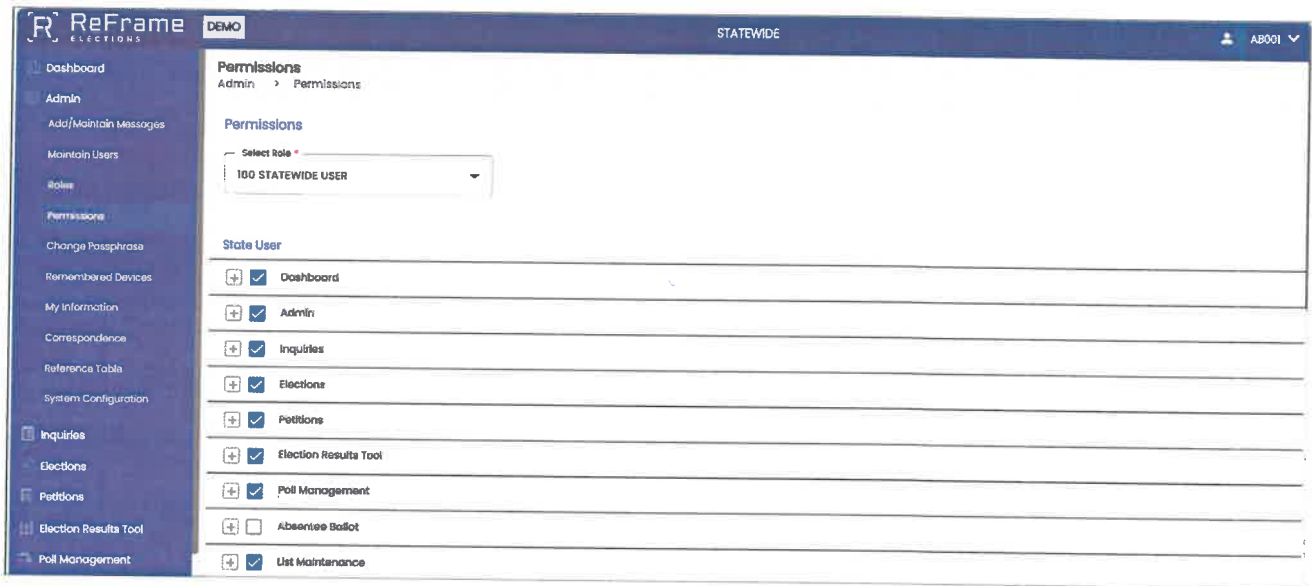


Figure 46 System Administration: Role permissions.

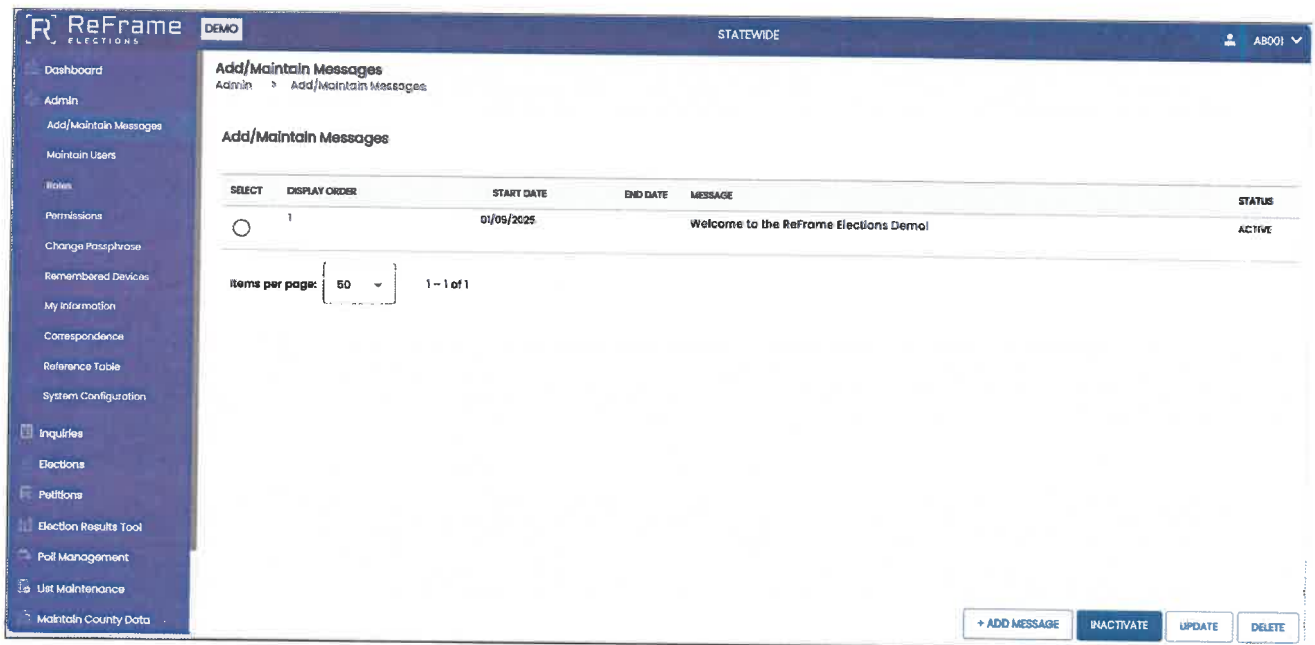


Figure 47 System Administration: Add/maintain messages.

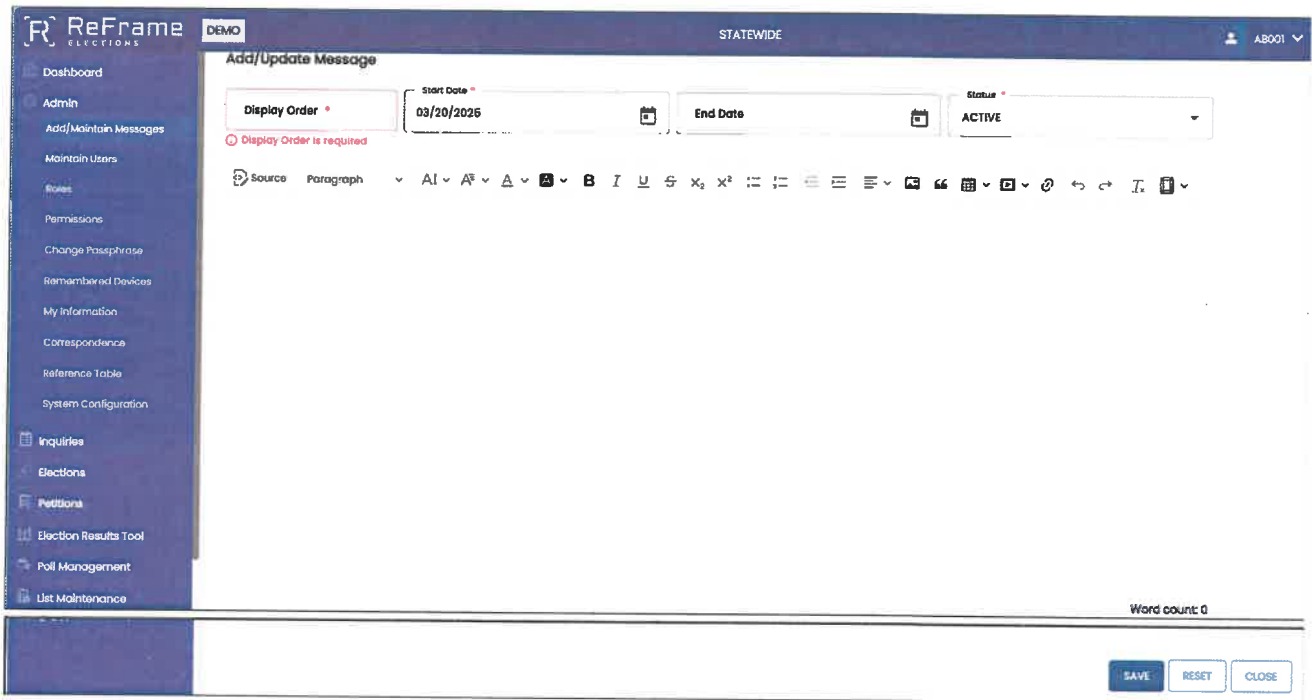


Figure 48 System Administration: Add message.

System Dashboard

A dashboard is provided for state and county users to review important information as Reminders (Vital Records, Records from Department of Corrections, NCOA Matches etc.). Functional and system level utilities are developed to handle activities such as backup, validations, reporting and archival conforming to SOS and legal standards.

The solution provides lookup table maintenance functionality with the capability of configuration of lookup data that appears in dropdowns and lists within the application. The system administrator/authorized users can perform the lookup table maintenance (Add/Modify/Delete) from the application based on privileges.

The system workflows and interfaces to collect and/or share required voter and election information conform to industry development and security standards, including West Virginia statutes, HAVA, NVRA, UOCAVA, W3C, NIST, etc.

User Interface and Documentation

The system utilizes industry best practices for all UX design, messaging, and intuitive processing controls to make for an efficient experience for state, municipal and voter users. Screens include 1-click access to all related data and users can use additional

browser sessions to look up additional data while maintaining their position on the current screen.

In addition to admin-configurable help screens and features, the system includes a complete set of (a) technical documentation, (b) database and application documentation and (c) end user documentation, provided in electronic format through the project repository or through online links in the SVRS application(s) as appropriate.

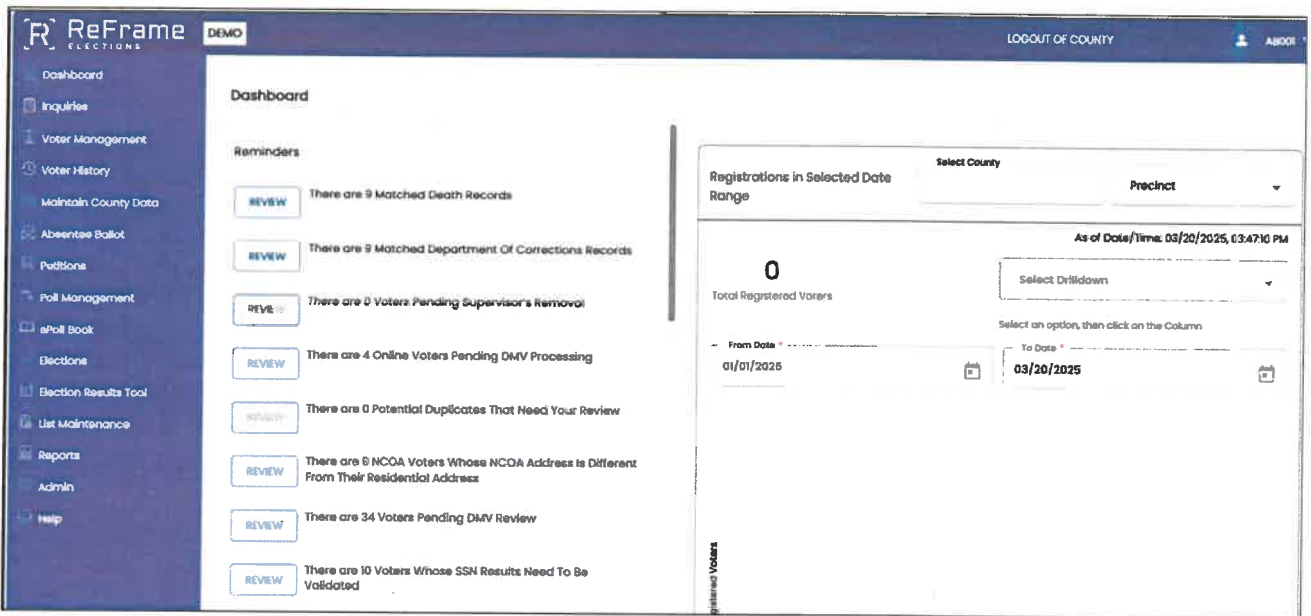


Figure 49 County Dashboard: Configured separately for each with the pertinent features.

Online Voter Registration (OVR)

The proposed solution will include a separate online voter registration application that will allow users to register to vote or update their existing application through a modern, browser agnostic application that is ADA Compliant (WCAG 2.1 “AA”) and mobile responsive. This application can be accessed via latest Cell Phones, Tablets and Computers using the latest versions of the reputed Browsers. Data entered into the system is verified to make sure the data entry is made by Humans and not by bots utilizing a Captcha. We use address location services to make it easy for the public to enter their Residence Addresses into the system. Users can enter the Address by typing into the fields. Once the Registration form is filled and submitted, the data will be encrypted, securely stored in the local database and instantly transmitted to the Statewide Voter Registration System. Driver’s License will be validated instantly if API is available else it will be done via nightly batch process and they will be displayed on the respective County Clerks Dashboards for further.

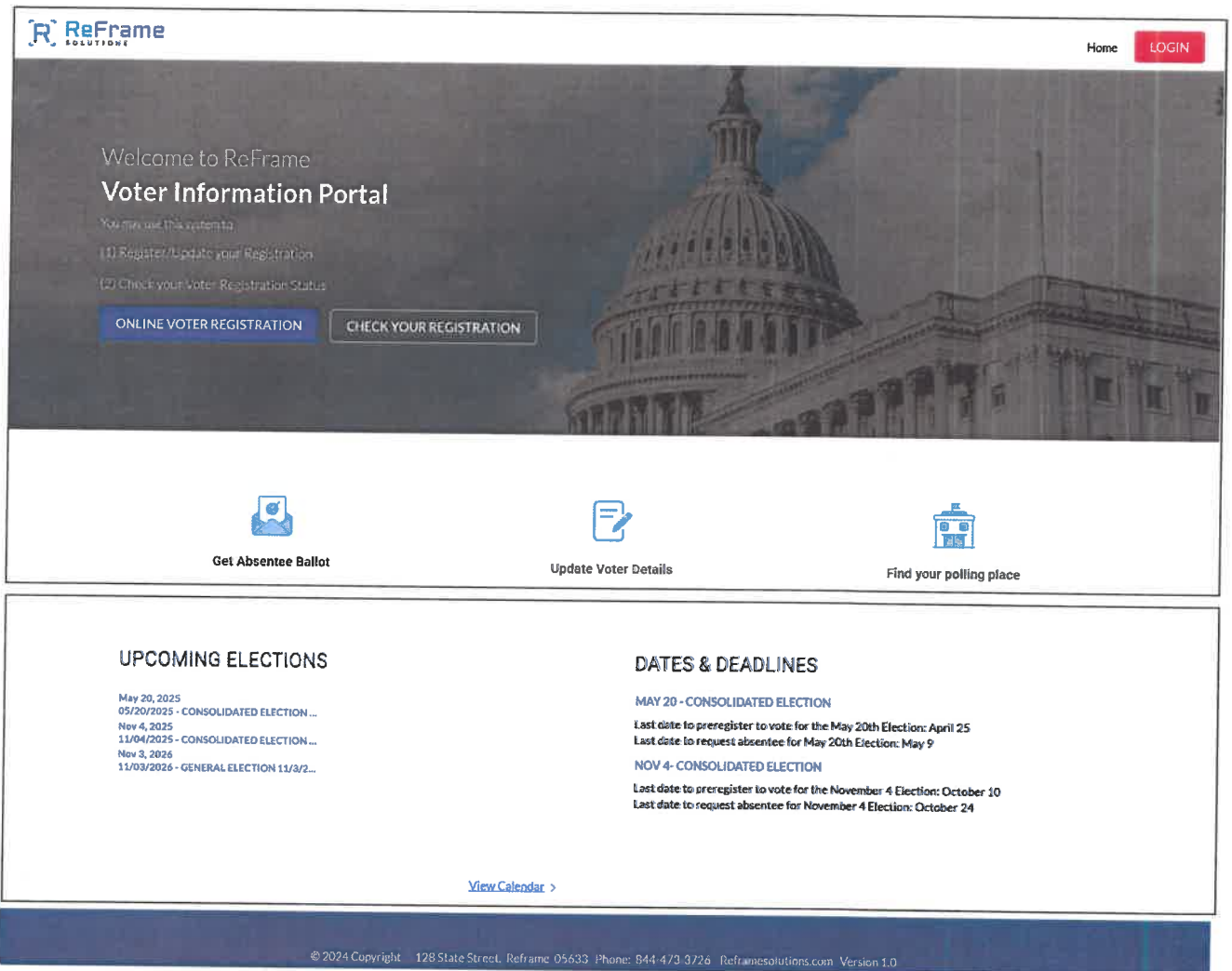


Figure 50 Landing page for online voter registration and voter information portal.

Voter Registration Search

Welcome to the ReFrame Online Voter Registration System

You can use this system to register for the first time or update your existing voter registration information.

Click the **'Begin Registration'** button to begin your online voter registration process.

Please check the box below to proceed.

☒ I'm not a robot reCAPTCHA
Privacy - Terms

BEGIN REGISTRATION

1 Online Voter Registration

- In order to register online, you will need one of the following to verify your identity:**
 - State Driver's License or Identification Card issued by State department of Highway safety & Motor Vehicles.
 - The issued Date (MM/DD/YYYY) of your State DL or State ID card; and
 - The last four digits of your Social Security Number.
- Don't have one of these forms of ID? Or It is not current?**

Update your information online or find out where to obtain one by visiting the State DMV at <https://ltd.state.gov/ltdmvl/>.

Having an up-to-date State ID will assist in verifying your information during this process and can be used as ID when you vote.

Figure 51 Online voter registration view.

Voter Registration Search

Voter Registration Search

First Name *

Last Name *

Date of Birth *

☐ I have never been issued a State DL or State ID card.

☐ I have never been issued a Social Security Number.

Driver's License Number *

Confirm Driver's License Number *

SSN Number

SEARCH

1 Voter Registration Search

- Name Verification for Voter Registration**

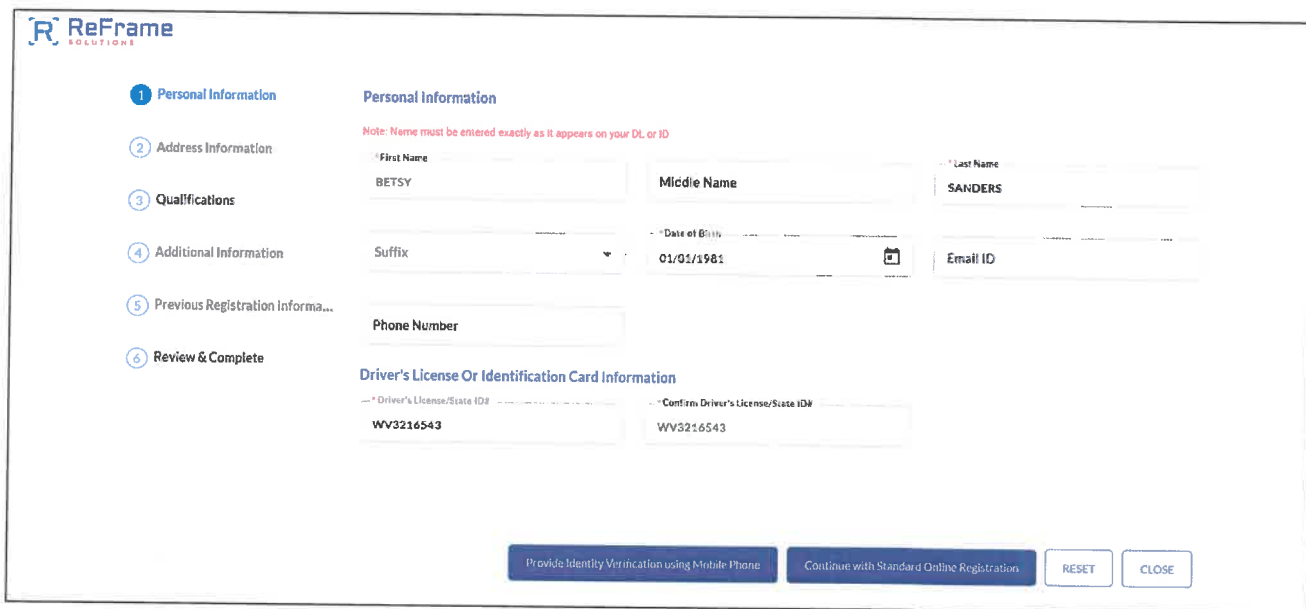
Name must be entered exactly as it appears on your Voter Registration Card.

If previously registered, ensure the entered name matches your existing registration details.
- What to Do if No Record is Found?**

If you see "No record found" based on the information entered, click 'Begin New Registration' below to start a new voter application.
- Correcting Entered Information**

If you entered any of the information incorrectly, then select 'Start Over' button to correct the information and continue with your online registration.

Figure 52 Online Voter Registration: Search voter page.



ReFrame SOLUTIONS

1 Personal Information

2 Address Information

3 Qualifications

4 Additional Information

5 Previous Registration Information

6 Review & Complete

Personal Information

Note: Name must be entered exactly as it appears on your DL or ID

* First Name: BETSY

Middle Name:

* Last Name: SANDERS

Suffix:

Date of Birth: 01/01/1981

Email ID:

Phone Number:

Driver's License Or Identification Card Information

* Driver's License/State ID#: WV3216543

* Confirm Driver's License/State ID#: WV3216543

Provide Identity Verification using Mobile Phone

Continue with Standard Online Registration

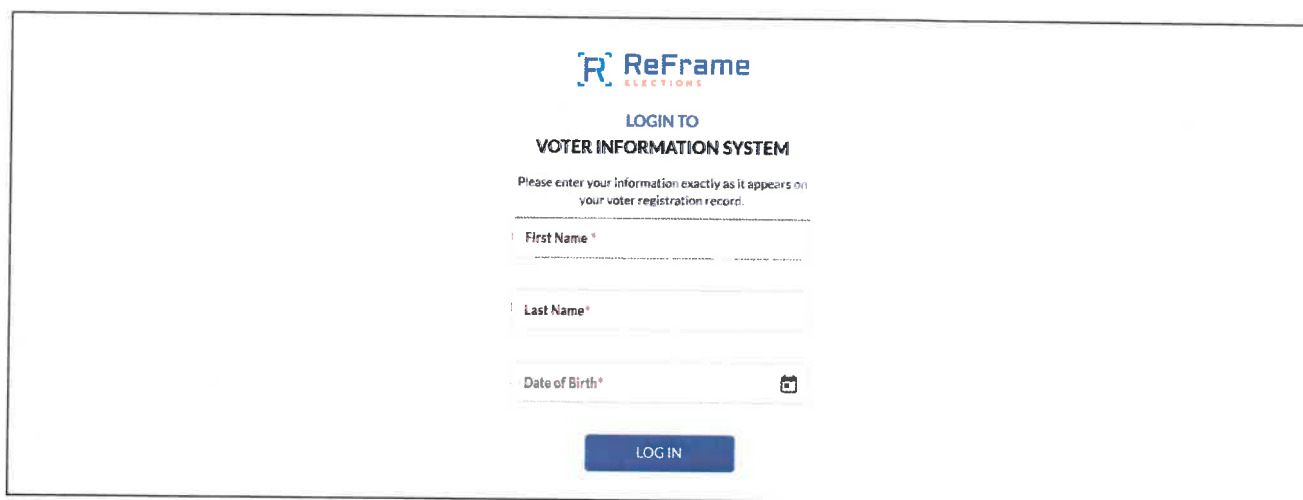
RESET

CLOSE

Figure 53 Online Voter Registration: New voter registration.

Voter Information Portal (VIP)

Once logged in, the VIP portal provides a view of the voter's status, party affiliation, and any requests for absentee ballots and their current status. This ADA Compliant (WCAG 2.1 "AA") and mobile responsive portal also shows the voter's polling location or poll worker updates. The portal also allows voters to initiate changes to their voter record such as Name (married or other legal change), Address, Party Affiliation, etc. Voter will have to enter their Driver's License before any edits can be made or before an absentee ballot request can be submitted.



ReFrame ELECTIONS

LOGIN TO

VOTER INFORMATION SYSTEM

Please enter your information exactly as it appears on your voter registration record.

* First Name *

* Last Name *

* Date of Birth *

LOGIN

Figure 54 Online Voter Registration: Login page.

MYRON BOYLES

Hello,
MYRON BOYLES
Party Affiliation: UNAFFILIATED
You've been registered to vote since 11/20/2024.
If you need to change any of your Voter Information listed on this page, please click on 'Update Voter Information' below

Next Election Date: 05/20/2025

Voter Information
Voter ID: 100000023
Name: MYRON BOYLES
Date of Birth: 01/01/2001
Residence Address: 100 MAIN ST ELKINS WV 26241
Mailing Address:
Are You Interested Serving as a Poll Worker? YES
Registration Date: 11/20/2024
County of Residence: RANDOLPH
Status: YOU ARE REGISTERED TO VOTE!

Update Voter Information

Request/View Absentee Ballot

Poll Worker Updates

Polling Place
STAR LIBRARY (ELECTION DAY)
10706 STATE ST
ELKINS WV 26241

Elections Information
Election Date - Name
05/20/2025 - CONSOLIDATED ELECTION 5/20/2025

Voting Districts
Precinct: 1003
Congressional District: 1
Legislative District: 10

Hours
8:00 AM-8:00 PM

☐ Email ☐ Text
CITY HALL (EARLY VOTING)
10769 STATE ST
ELKINS WV 26241
Hours
8:00 AM-8:00 PM

[CANDIDATE LIST >](#)
[CLICK HERE FOR SAMPLE BALLOT >](#)

County Clerk: ALAYA ROSS
County: RANDOLPH
Address:
Phone:
Fax:
Email:
Website:
Hours of Operation: 08:00 AM - 05:00 PM

Judicial District: 4

PRINT REGISTRATION CERTIFICATE

Please Note: Polling Places are subject to change. Always check your designated Polling Place location via this website prior to going to vote.

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Powered by

Figure 55 Landing page for a logged in registered voter.



Product Overview

Empower Your Agency with ReFrame's Comprehensive Disclosure Suite

At ReFrame, we're on a mission to redefine campaign finance and lobbying management, bringing transparency, simplicity, and trust to the forefront. Crafted by industry experts, our dynamic platform caters to both state and local agencies, ensuring seamless management and compliance for campaign finance and lobbying information.

Campaign Finance Information System

Designed for the modern era, ReFrame's platform empowers administrators to seamlessly configure elections, reporting periods, thresholds, and limits to meet statutory requirements. Administrators can also send reminders, compliance notices, and personalized communications, ensuring filers stay informed and compliant.

Additionally, the system allows for configurable fine calculations, enabling automatic assessment of fines. Filers benefit from an intuitive, streamlined experience that simplifies data entry for disclosure reports, and can conveniently make payments using our integrated payment gateway. With a commitment to transparency, ReFrame's platform ensures the public can access 100% of disclosed information, building trust and accountability by showcasing the influence of money on elections.

Lobbying Activity Information System

ReFrame's solution provides 100% transparency in lobbying practices, promoting compliance and offering valuable insights into the financial aspects of lobbying. From simplifying processes for lobbyists, firms, and clients to enabling easy registration, expenditure entry, and reporting, the platform ensures comprehensive, efficient record-keeping. Configurable settings allow administrators to set tailored reporting periods, streamlining administrative tasks and ensuring adaptability to different lobbying categories.

Campaign Finance

Online Registration:

Using the Register feature from the Public Portal (above), a Filer can create a new campaign finance account by following an intuitive step-by-step process.

Welcome to the ReFrame Public Disclosure and Filing Portal
Ensuring the Integrity of the Elections Process and Our Public Officials

Search Data Based On Categories

Search Candidate Profiles
Search by entering candidate name

Examples: John Thompson, Frank Jones, Andrew Smith, etc.

Additional Suggested Candidate Searches
2024 Top 20 Fundraising Candidates
2024 Top 20 Candidate Recipients of PAC Money
Search All Active State District Candidates
Custom Candidate Search

Search Transactions By Donor Or Payee
Search by entering Donor or Payee Name

Examples: John Doe, or Microsoft

Additional Suggested Transaction Searches
All contributions over \$2,000
All Contributions to Candidates running in 2024
All PAC Contributions to Candidates running in 2024
Custom Transaction Search

Latest News & Announcements

- Welcome to the new and improved ReFrame Public Disclosure and Filing Portal!**
This new portal provided by the ReFrame Secretary of State improves the information, performance, and ease of use for the public, filers, and agency administrators. Learn more about all of the key changes...[READ MORE](#)
- System Maintenance Alert! January 10th, 2023 12:01AM through January 10th, 2023 3:00AM**
This portal will be periodically unavailable during these hours as we update the system with even more great features and performance enhancements to provide you with a top-notch filing experience!...[READ MORE](#)
- Important Compliance Rule Change Added by the State Ethics Commission**
Starting in the 2024 Election Cycle the aggregate contribution amount an individual can give to each candidate for an election will be \$50,000...[READ MORE](#)

[View All](#)

Login
Login to an Existing Account

Username *

Password *

[Forgot Password?](#)

[Login](#)

Figure 1 Public Portal Landing Page – where Filers can register, and Filers and Admin can log in.

ReFrame DISCLOSURE

Candidate Registration

1. Candidacy Details 2. Campaign Details 3. Office Details 4. Review and Register

Registration Date * 3/20/2024

Election Year * 2024

Candidate Type * State

Office Sought * Governor

Party Affiliation *

[Next](#) [Cancel](#)

Intuitive step-by-step guided workflows.

Configurable Data Structures: If a district, seat, or zone is required for the office, the system will prompt for additional information.

Figure 2 Registration Step 1: Candidacy Details

ReFrame
DISCLOSURE

Candidate Registration

1 ☒ Candidate Details 2 ☒ Candidate Details 3 ☐ Committee Details 4 ☐ Officer Details 5 ☐ Review & Register

Personal Details

Title First Name Middle Name Last Name

Suffix

Address Details

Address 1 Address 2

City Zip Code

City is required

Contact Details

Phone Mobile Email Alternate Email

Intuitive User Experience:
Clear business rule enforcement such as required fields.

Secure: Mobile Phone or email used for Multi-Factor Authentication.

Figure 3 Registration Step 2: Candidate details

ReFrame
DISCLOSURE

Candidate Registration

1 ☒ Candidate Details 2 ☒ Candidate Details 3 ☒ Committee Details 4 ☐ Officer Details 5 ☐ Review & Register

Candidate Committee Details (If no step is optional) ☐ Does the candidate have a campaign committee?

Committee Name

Address 1 Address 2

City Zip Code

If the statutes allow for Candidates without a committee, this is configurable.

Figure 4 Registration Step 3: Committee details

Candidate Registration

Progress: ✓ Candidacy Details ✓ Candidate Details 1 Officer Details 5 Review & Register

Note: The designation of a Treasurer and a Chairperson is required. Other officers can be added optionally. Each individual must have access to this account.

Officer Type	Name	Residential Address	Mailing Address	Mobile	Email	Actions
Treasurer	Money, Jessica	123 Main St, Anytown, ID 30833	123 Main St, Anytown, ID 30833	(480) 200-4465	jmoney@mail.com	⋮ Edit Delete
Authorized User	Jenkins, Bill		111 South Way, Anytown, CO 30833	(480) 111-1231	bjenkins@mail.com	⋮ Edit Delete

Item(s) per page: 10 1 - 2 of 2

Buttons: Add Officer, Print, Discard, Cancel

Figure 5 Registration Step 4: Officer details

Candidate Registration

Progress: ✓ Candidacy Details ✓ Candidate Details ✓ Committee Details ✓ Officer Details 5 Review & Register

Candidacy Details

Registration No: 03/23/2024 Election Year: 2024 Office: Governor Party: Democrat Party

Candidate Details

Title: Joe Smith
Address 1: 123 Main St, Anytown, CO 30833
Phone: (480) 003-1212

Committee Details

Committee Name: Friends of Joe Smith
Address 1: 111 Main St, Anytown, CO 30833

Officer Details

Officer Type	Name	Address	Phone	Email
Treasurer	Money, Jessica	123 Main St, Anytown, CO 30833	(480) 003-1212	jmoney@mail.com

☐ I hereby swear or affirm under penalty of law that all information on this form is true, correct, and complete to the best of my knowledge.

Buttons: Edit, Submit, Cancel

Figure 6 Registration Step 5: Review & register

Once the registration is submitted, the Filer receives an email explaining the next steps in the process.

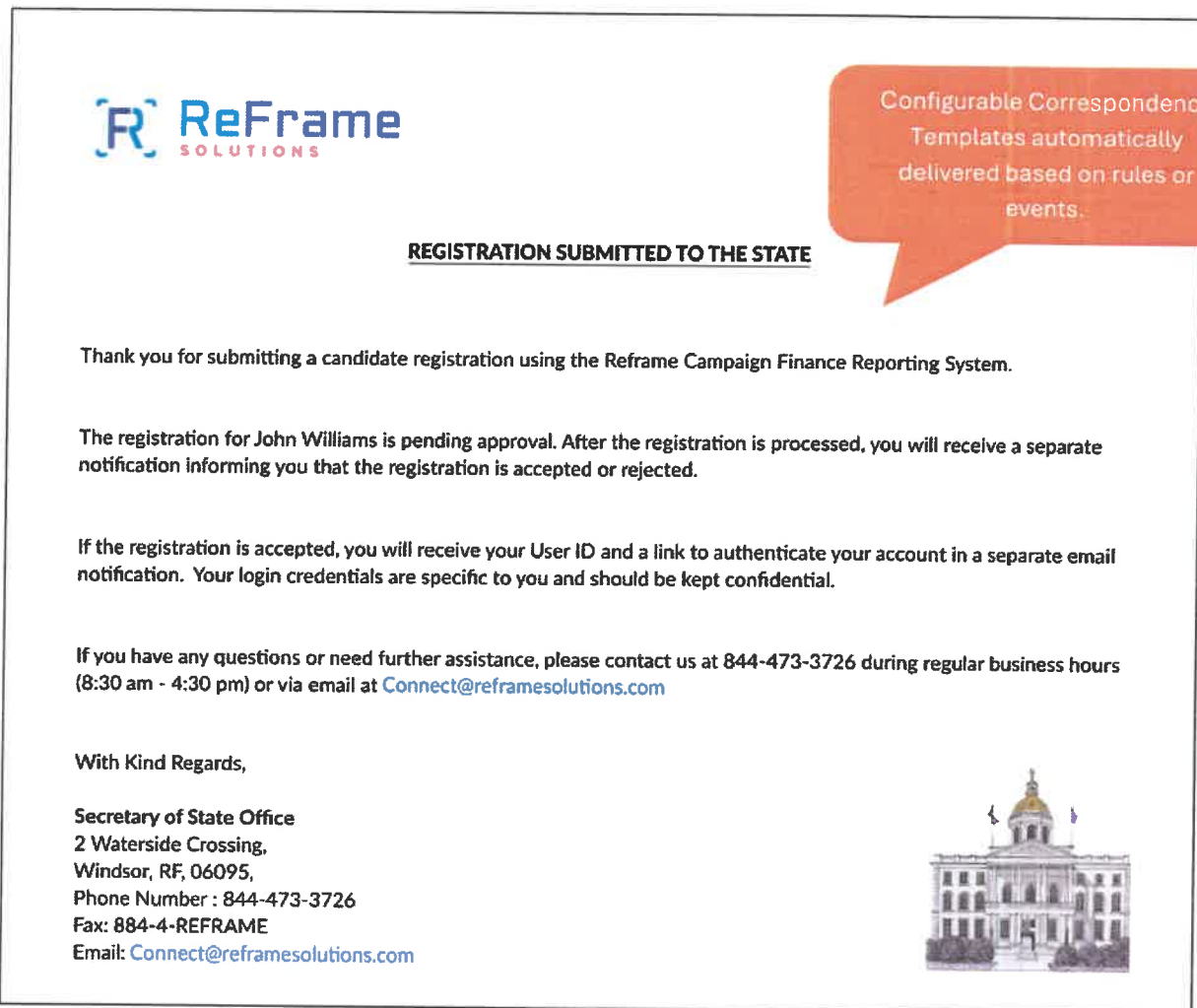


Figure 7 Configurable correspondence templates.

Filer Portal:

The Filer Portal offers various features for the Filers, such as a dashboard highlighting key information with drill down capability, ability to add contributions, expenditures, loans and other transactions, file reports, and manage compliance issues including online payment for fees and fines.

Individual users must authenticate their account before accessing the filer portal. First time use includes answering a security question and setting up a password.

Figures: Robust Security Features such as MFA and NIST-compliant password and secret question rules

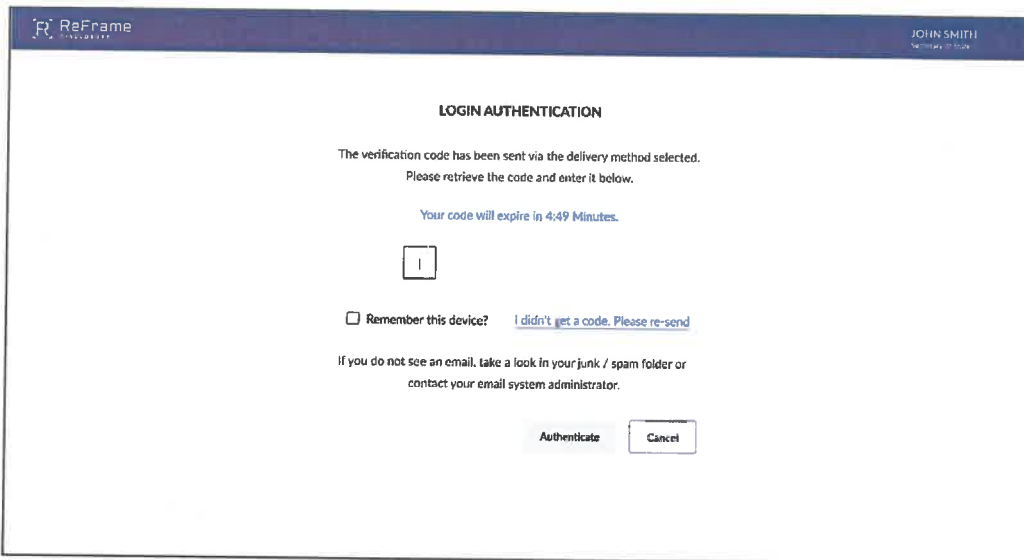


Figure 8 Robust security features, like multi-factor authentication.

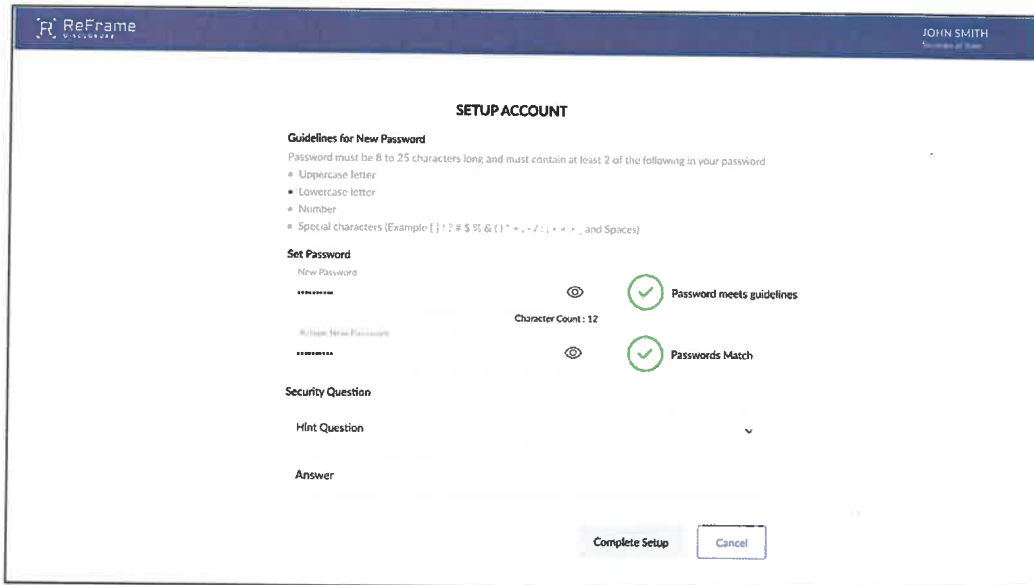


Figure 9 Also, NIST-compliant password and security question rules.

Upon logging in, the filer is directed to the *Accounts* page if they have more than one account. The *Accounts* page provides a centralized and convenient way to manage multiple filing entities. It functions as a hub where a filer can see all the different filing entities they are associated with. It's convenient because a filer can switch between these entities instantly without logging in and out of several accounts.



Filing Entity Name	Role	Type	Last login
Bent, Paula	Treasurer	Campaign Finance	05/23/2022, 08:36:00 PM
Garcia, Maria	Secretary	Lobbyist	06/18/2022, 09:20:00 PM
Johnson, James	Chairperson	Financial Interest	07/26/2022, 10:10:00 PM
Martinez, Maria	Lobbyist	Campaign Finance	08/21/2022, 12:30:00 PM
Smith, David	Candidate	Financial Interest	05/27/2022, 06:10:00 PM
Smith, James	Resident Agent	Lobbyist	09/18/2022, 11:33:00 PM
Smith, Michael	Treasurer	Financial Interest	04/23/2022, 06:18:00 PM
Williams, John M.	Resident Agent	Campaign Finance	03/06/2022, 06:12:00 PM

Convenient: Manage all associated filing entities with only one login.

Rows per page: 10 1-10 of 30

Figure 10 Accounts page.

After selecting the desired Account, the *Filer Dashboard* provides filers with a centralized and easily accessible overview of their account activities. The filer can access all functionality from their dashboard and drill down to gain additional insight into their account.

Figure: Filer Dashboard

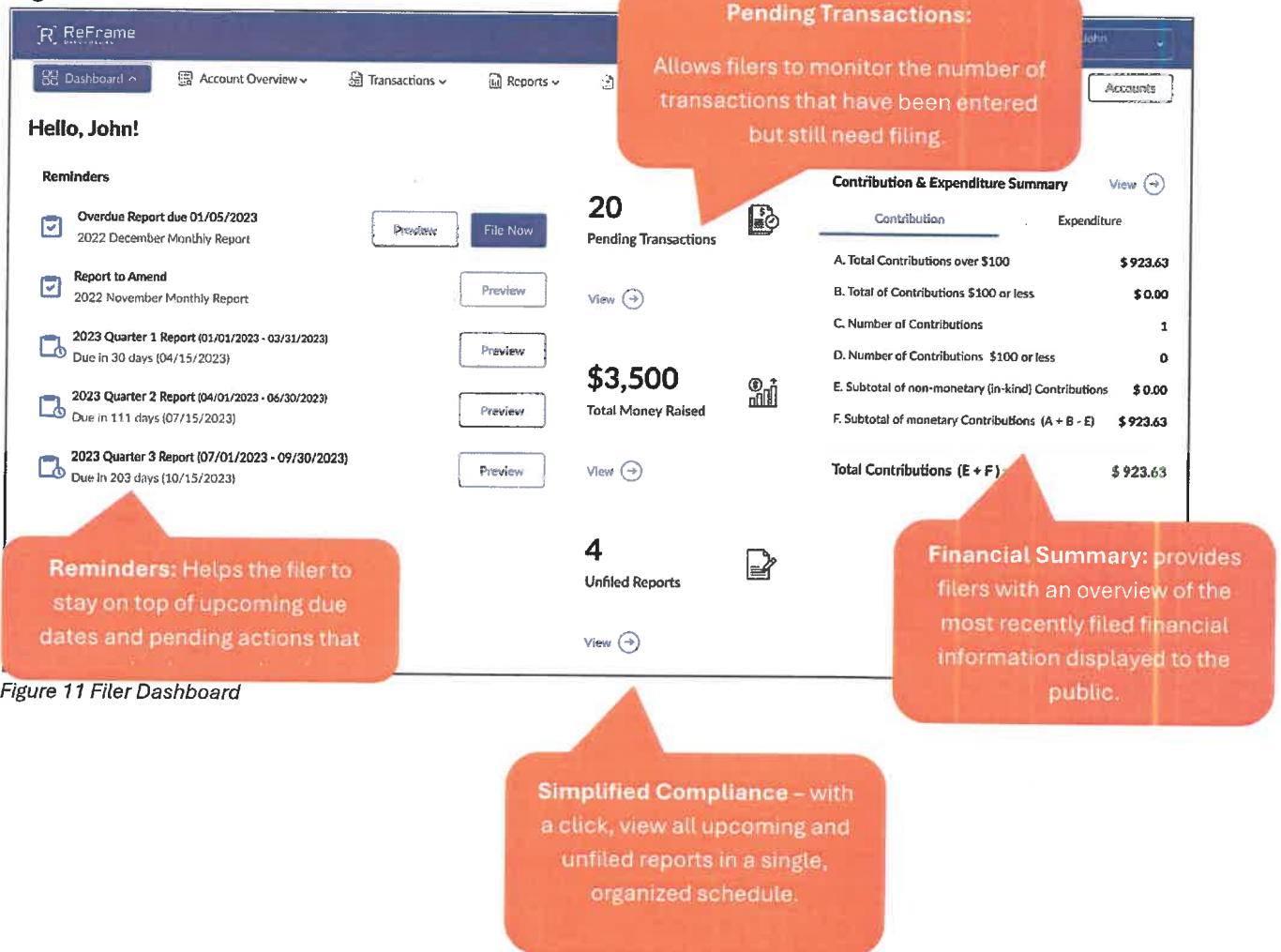


Figure 11 Filer Dashboard

The Account Overview screen displays a comprehensive snapshot of the filer's account information. The Documents Tab stores all notification sent by the system to this filer.

Figure: Filer Account Overview

The screenshot shows the 'Account Overview' page for a filer named John Williams. The page is divided into several sections: 'Candidacy Details', 'Candidate Details', 'Officer Details', and 'Amended History'. Callouts highlight the 'Amend' and 'Terminate' buttons, the 'Secure Termination' process, and the 'Amended History' table.

Amend with Ease: Filers can update registration details with a simple amendment process.

Secure Termination: Filers can officially close their account after meeting all filing obligations and business rules.

Registration Amendments: Preserves registration information history. Easily access all versions of the registration form.

Account Overview

Dashboard | **Account Overview** | Transactions | Reports | Bu...

Williams John
Terminator

Accounts

Account Overview

Profile | Documents | Compliance | Event Logs

Candidacy Details

Registration Date: 02/28/2022

Filing Cycle: 2022 Candidate Election Cycle

Office: Auditor of State

Party: Republican Party

Candidate Details

Title: Mr.

First Name: John

Middle Name:

Last Name: Williams

Suffix: I

Address 1: 2 Waterside Crossing

Address 2:

City: Windsor

State: RF

Zip Code: 06095

Phone: 844-473-3726

Email: jwilliams@mail.com

Alternate Email 1: smith@mail.com

Alternate Email 2: smith@mail.com

Officer Details

Officer Type	Name	Address	Phone	Email
Treasurer	Matthews, Roy	2 Waterside Crossing, Windsor, RI, 06095	844-473-3724	rmattthews@mail.com

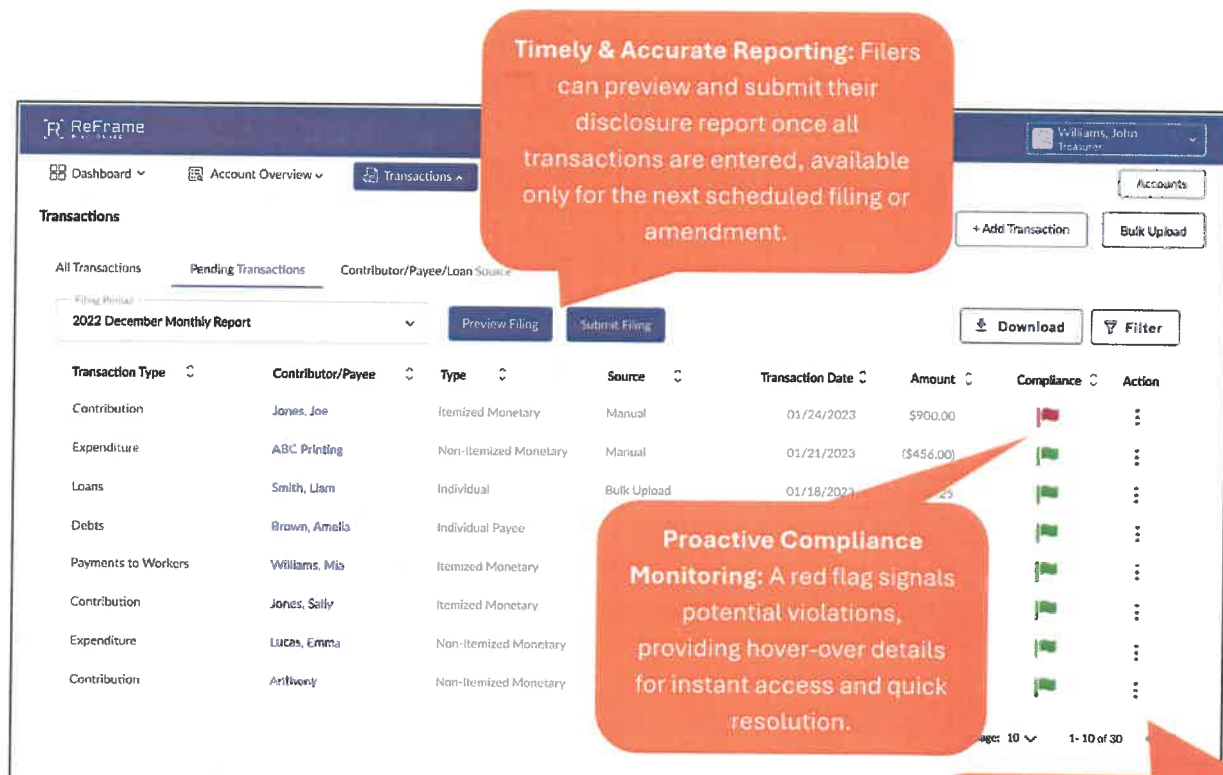
Amended History

Name	Filer Type	Filing Cycle	Office	Type	Modified Date	Actions
Bent, Paula	Candidate	2022 Non-Partisan Election Cycle	District Attorney	New	01/18/2022	Download

[View Candidate Information Sheet](#)

Figure 12 Filer Account Overview

The *Transactions Screen* provides a filer with a detailed view of their transactions. Filers can add/edit/delete/amend transactions. The “All Transactions” grid displays all transactions for the account, while the “Pending Transactions” grid displays the transactions at a disclosure report level that have not been filed yet. As a “Transactional Based” solution, the filer does not need to specify the report a transaction is filed with. Transactions are automatically assigned to a report based on the Transaction Date, eliminating potential errors.



Timely & Accurate Reporting: Filers can preview and submit their disclosure report once all transactions are entered, available only for the next scheduled filing or amendment.

Proactive Compliance Monitoring: A red flag signals potential violations, providing hover-over details for instant access and quick resolution.

Action Menu: Use the Action Menu to Edit, Delete, Return, or Amend transactions. Returns are always associated with original transaction.

The screenshot shows the ReFrame interface with the following data table:

Transaction Type	Contributor/Payee	Type	Source	Transaction Date	Amount	Compliance	Action
Contribution	Jones, Joe	Itemized Monetary	Manual	01/24/2023	\$900.00	Red Flag	⋮
Expenditure	ABC Printing	Non-Itemized Monetary	Manual	01/21/2023	(\$456.00)	Green Flag	⋮
Loans	Smith, Liam	Individual	Bulk Upload	01/18/2023	\$25	Green Flag	⋮
Debts	Brown, Amelia	Individual Payee				Green Flag	⋮
Payments to Workers	Williams, Mia	Itemized Monetary				Green Flag	⋮
Contribution	Jones, Sally	Itemized Monetary				Green Flag	⋮
Expenditure	Lucas, Emma	Non-Itemized Monetary				Green Flag	⋮
Contribution	Artifony	Non-Itemized Monetary				Green Flag	⋮

Figure 13 Transaction Management

The *Add/Edit Transaction* screen is used when adding a transaction or editing an existing one. All transactions will capture statutorily required information. Contributions will display the aggregate total from that contributor for compliance checks.

The screenshot shows the 'New Contribution' screen in the ReFrame application. The interface includes a navigation bar with 'Dashboard', 'Account Overview', 'Transactions', 'Reports', and 'Bulk'. The 'Transactions' tab is active. The main form is titled 'New Contribution' and includes sections for 'Contribution Type', 'Contributor Details', and 'Transaction Details'. A callout points to the 'Contributor' search field, stating: 'Contributor: Search for previously entered contributors to reduce redundant data entry and support automatic Limit Checks.' Another callout points to the 'Available Help' panel on the right, stating: 'Available Help: Help panel provides helpful tips and guides the filer in transaction entry.' A third callout points to a 'Potential Compliance Issue' alert, stating: 'Compliance Alert: Extra-friendly feature that alerts the filer to the fact that they may have made a mistake based on the rules configured by the Admin. Alerts the filer to correct bad data entry, process Returned Contributions, or other remedies prior to filing and incurring potential violations.' The alert message reads: 'This contributor has exceeded the limit of \$1,000.00. Consider these options: If the dollar amounts entered are correct, return all or a portion of the contribution to the original contributor. If the dollar amounts entered are not correct, fix the error. Verify the Election Type is correct. Note: If any filed transaction is modified, you will need to file an amended disclosure report.'

Contribution

Federal candidates must, campaign committee. This committee takes in contributions and expenditures for the campaign. Candidates may designate authorized campaign committee to raise and spend funds, but campaign committee is not

Aggregate Total Contribution for Meta Platforms as of 01/01/2024

Itemized Contribution Amount:	\$6,000.00
Unitemized Contribution Amount:	\$0.00
in-kind Contribution Amount:	\$0.00
Aggregate Total Contributions for Primary	\$6,000.00

Potential Compliance Issue

This contributor has exceeded the limit of \$1,000.00.

Consider these options:

- If the dollar amounts entered are correct, return all or a portion of the contribution to the original contributor.
- If the dollar amounts entered are not correct, fix the error.
- Verify the Election Type is correct.

Note: If any filed transaction is modified, you will need to file an amended disclosure report.

Available Help:

Help panel provides helpful tips and guides the filer in transaction entry.

Contributor: Search for previously entered contributors to reduce redundant data entry and support automatic Limit Checks.

Figure 14 Add/edit transaction screen.

The Import Transactions feature provides the functionality for filers or designated 3rd-party vendors to quickly and easily import transactions using a predefined template. Uses multi-threaded technology for superior performance.

Import History: Keeps a history of all the import files. Access any file at any time.

Monitor Processing Progress: See how many transactions were created and how many errored out.

Instructions and Templates: Download import templates, supporting documentation, and instructions.

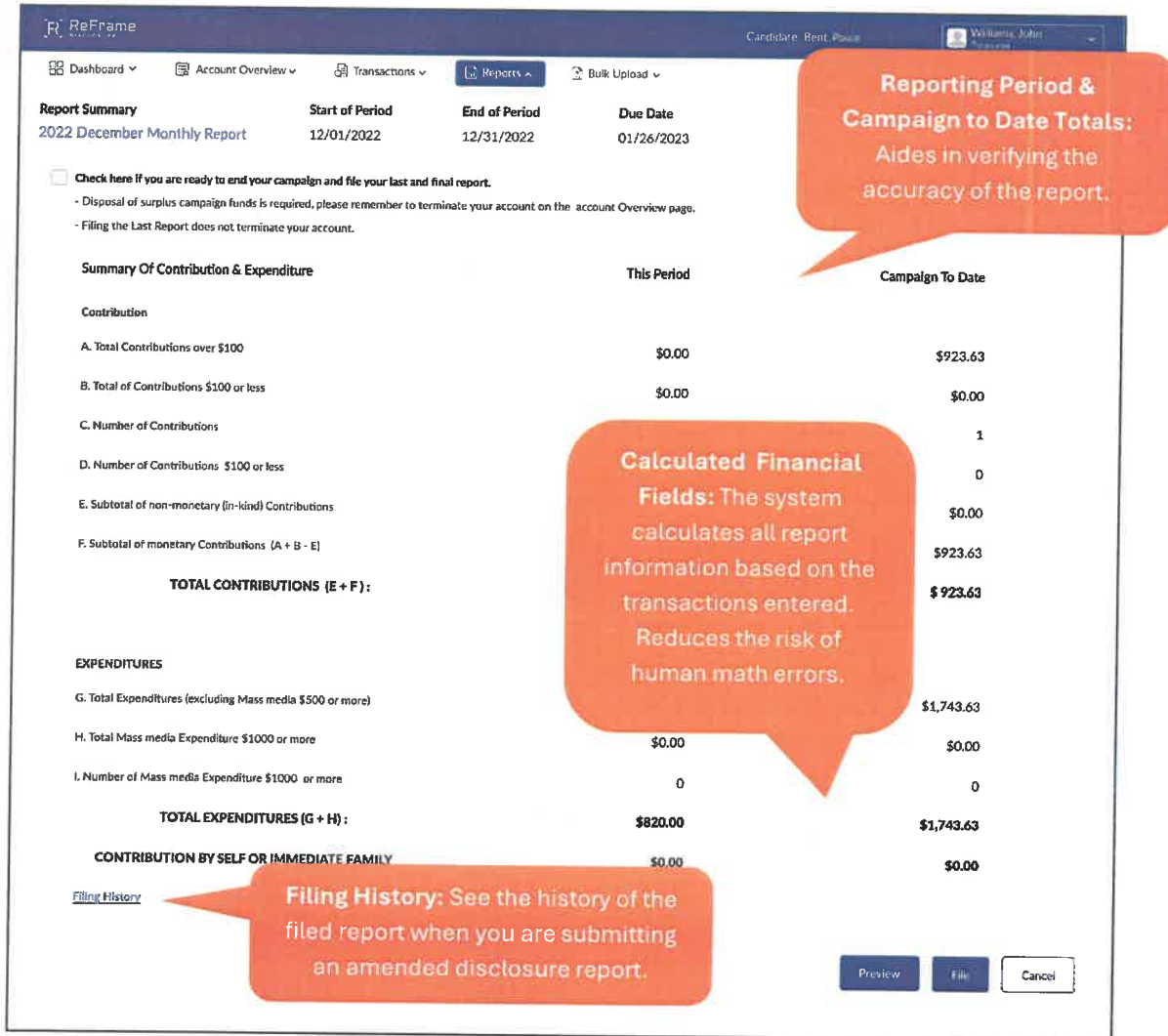
AVAILABLE SOON! A robust API for large filing organizations

Error File: Download an error file containing only the transactions with errors. Each transaction contains an error message to aid in the correction. No need to upload the entire file again, only upload the corrected errors.

Figure 15 Bulk Upload Screen where filers import transactions

ID	Name	Type	Description	Status	# of Records Uploaded	# Successfully Processed	# Errors Found	Action
ID23	ERRORS_20220103.xlsx	Expenditures	Corrected Error File	Processing	445	445	0	
ID34	XACTS_2022103.xlsx	Loans	From Aristotle	Completed	67,000	66,555	445	
ID99	XACTS_202209109.xlsx	Debts	From Aristotle	Cancelled	639			
ID99	XACTS_2022189.xlsx	Debts	From Aristotle	Deleted	12,999			

From the *Filing Screen*, a filer can preview a report, indicate it is the final report, and file the disclosure report. All filed information is visible on the public site upon submitting the filing, unless the jurisdiction has different rules (such as an approval process) that we will configure.



Reporting Period & Campaign to Date Totals:
Aides in verifying the accuracy of the report.

Calculated Financial Fields: The system calculates all report information based on the transactions entered. Reduces the risk of human math errors.

Filing History: See the history of the filed report when you are submitting an amended disclosure report.

Report Summary

Report Summary	Start of Period	End of Period	Due Date
2022 December Monthly Report	12/01/2022	12/31/2022	01/26/2023

☐ Check here if you are ready to end your campaign and file your last and final report.

- Disposal of surplus campaign funds is required, please remember to terminate your account on the account Overview page.
- Filing the Last Report does not terminate your account.

Summary Of Contribution & Expenditure	This Period	Campaign To Date
Contribution		
A. Total Contributions over \$100	\$0.00	\$923.63
B. Total of Contributions \$100 or less	\$0.00	\$0.00
C. Number of Contributions		1
D. Number of Contributions \$100 or less		0
E. Subtotal of non-monetary (in-kind) Contributions		\$0.00
F. Subtotal of monetary Contributions (A + B - E)		\$923.63
TOTAL CONTRIBUTIONS (E + F):		\$ 923.63
EXPENDITURES		
G. Total Expenditures (excluding Mass media \$500 or more)		\$1,743.63
H. Total Mass media Expenditure \$1000 or more	\$0.00	\$0.00
I. Number of Mass media Expenditure \$1000 or more	0	0
TOTAL EXPENDITURES (G + H):	\$820.00	\$1,743.63
CONTRIBUTION BY SELF OR IMMEDIATE FAMILY	\$0.00	\$0.00

[Filing History](#)

Preview File Cancel

Figure 16 Filing Screen where filers can preview and file

Public Portal:

Provides the public with access to complete information about filed disclosure reports, filed transactions, and filing entity registration details. The site offers convenient features such as pre-built searches, custom searches, and various filtering options, making it easy for users to explore data related to candidates, non-candidate committees, filed transactions and filed disclosure reports.

The Portal can be configured to allow Campaign Finance and Lobbyist Searches and information in a consolidated and cross-functional manner.

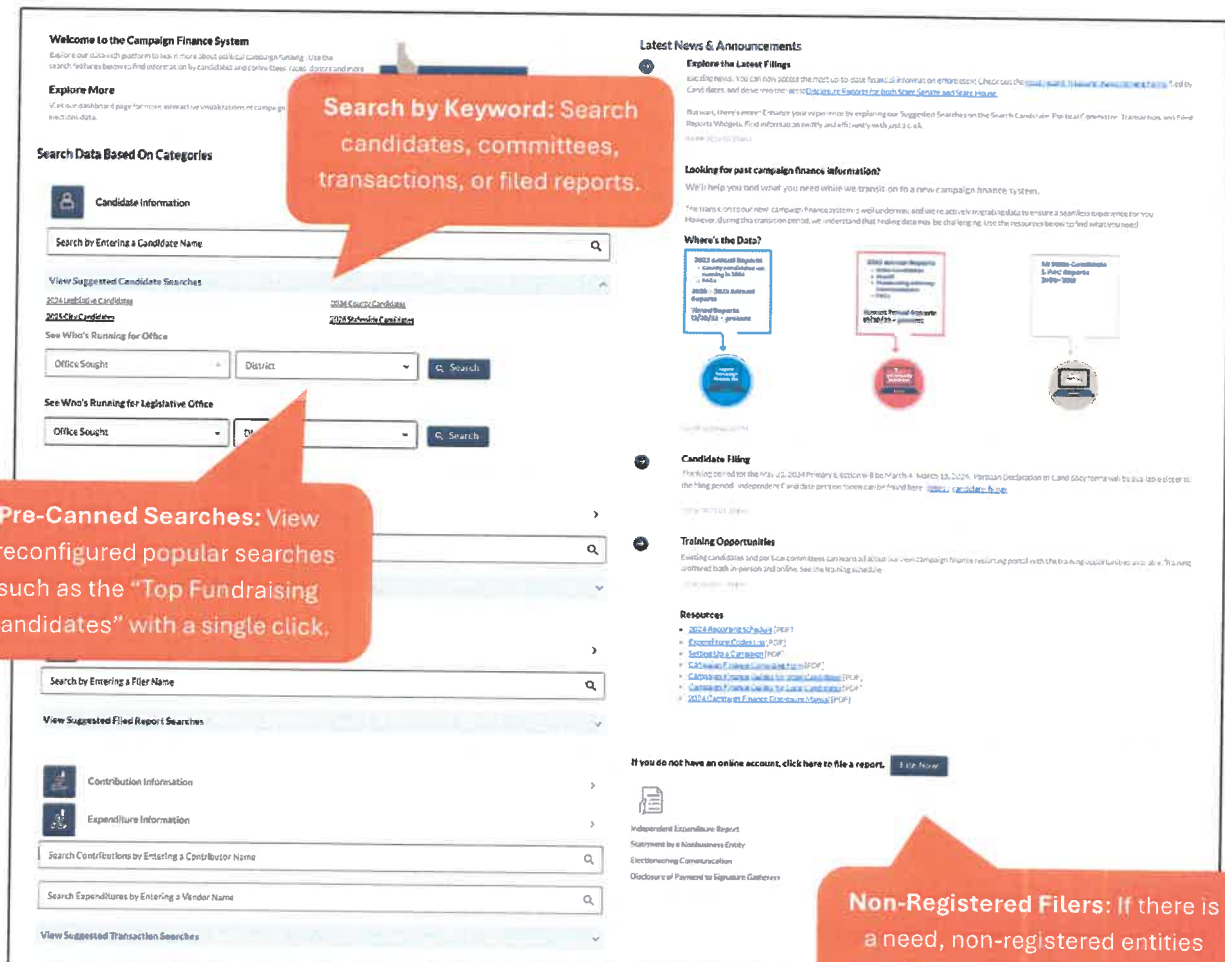
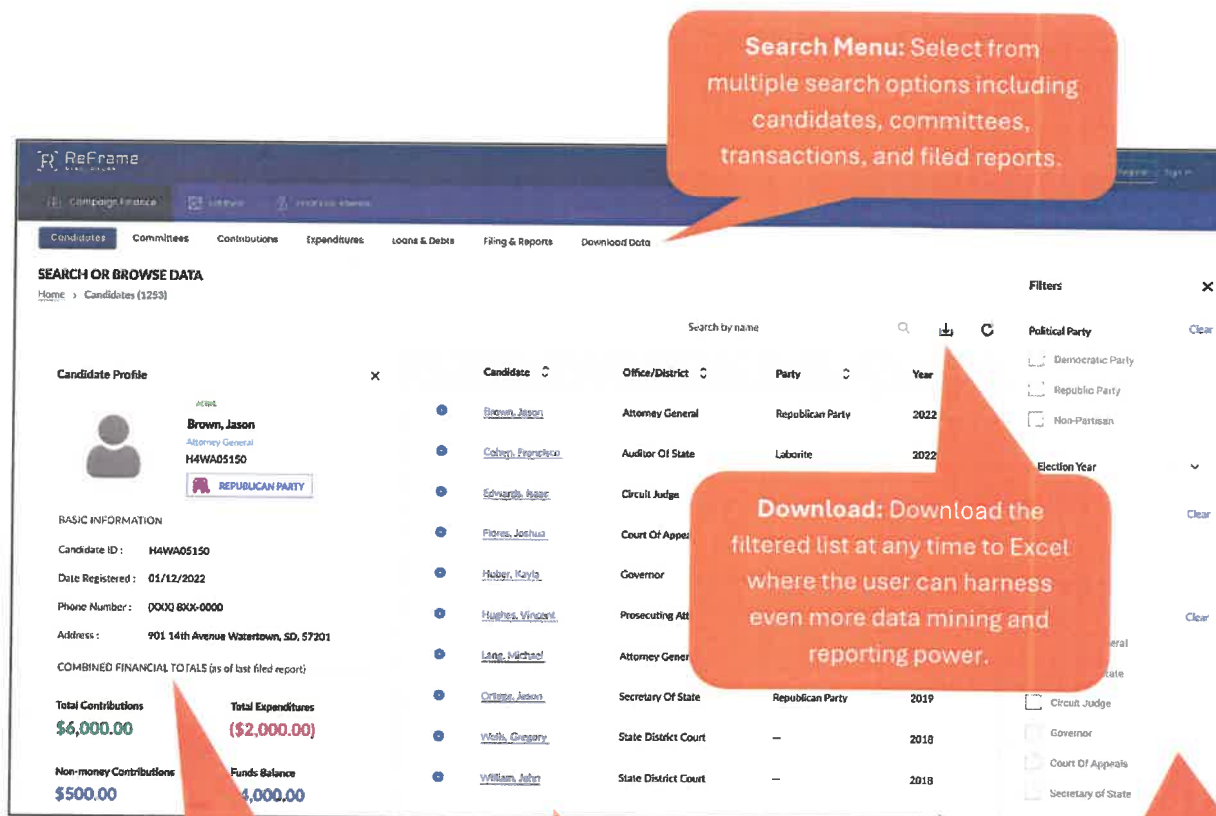


Figure 17 Public Portal Home Page

Search or Browse Data pages contain summary information about candidates, committees, transactions, and filed reports. The public or the media can perform robust research with the application's 100% transparency. Create any data list and download it to a .csv file.



Search Menu: Select from multiple search options including candidates, committees, transactions, and filed reports.

Download: Download the filtered list at any time to Excel where the user can harness even more data mining and reporting power.

Quick Details: View a collapsible panel for a quick look at a candidate's financial summary and registration information.

Filer Profile Link: Simply click on the filer name link to view the entire filing entity profile with history.

Available Filters: The public can apply various filters to create a customized list, making it easy to find specific information.

Search or Browse Data
Home > Candidates (1253)

Search by name

Candidate Profile

Brown, Jason
Attorney General
H4WA05150
REPUBLICAN PARTY

BASIC INFORMATION

Candidate ID: H4WA05150
Date Registered: 01/12/2022
Phone Number: (202) 800-0000
Address: 901 14th Avenue Watertown, SD, 57201

COMBINED FINANCIAL TOTALS (as of last filed report)

Total Contributions	Total Expenditures
\$6,000.00	(\$2,000.00)
Non-money Contributions	Funds Balance
\$500.00	\$4,000.00

Candidate List

Candidate	Office/District	Party	Year
Brown, Jason	Attorney General	Republican Party	2022
Cebey, Frederick	Auditor Of State	Libertarian	2022
Edwards, Jason	Circuit Judge		
Fines, Joshua	Court Of Appeals		
Huber, Kayla	Governor		
Hughes, Vincent	Prosecuting Att		
Lutz, Michael	Attorney General		
Ortaza, Jason	Secretary Of State	Republican Party	2019
Wells, Gregory	State District Court	-	2018
William, John	State District Court	-	2018

Filters

Political Party

☐ Democratic Party
☐ Republican Party
☐ Non-Partisan

Election Year

☐ Circuit Judge
☐ Governor
☐ Court Of Appeals
☐ Secretary of State

Figure 18 Search Results with quick details view.

From the Filer Profile link in the results list, view all public filer details to get an in-depth look at their campaign finance activity.

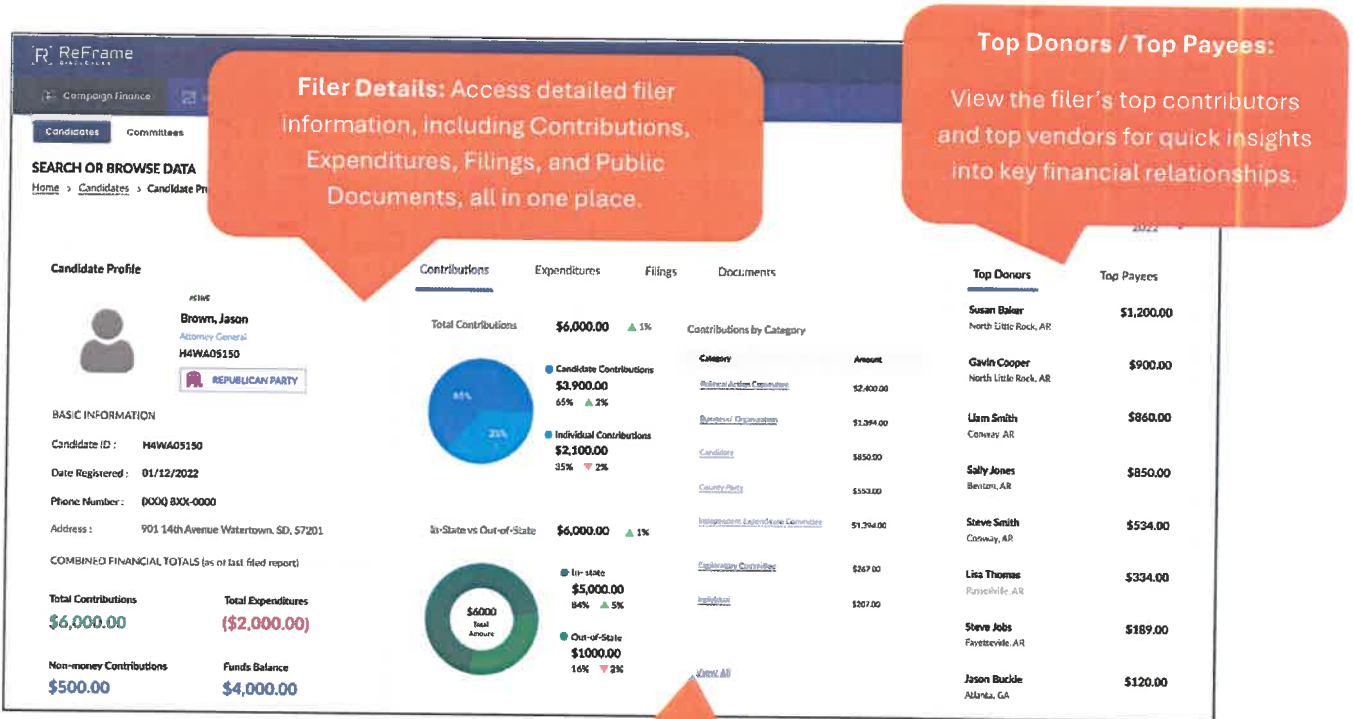


Figure 19 Detailed candidate profile page.

Administrative Portal:

The Administrative Portal offers various features for the Agency Users, such as a dashboard highlighting key information with drill down capability, ability to configure elections and reporting periods, user roles and permissions, templates and notifications, and statutory limits and compliance flags. Also includes the ability to investigate potential violations, automatically or manually set fees and fines, or process waiver requests.

Figure: Administrator Dashboard

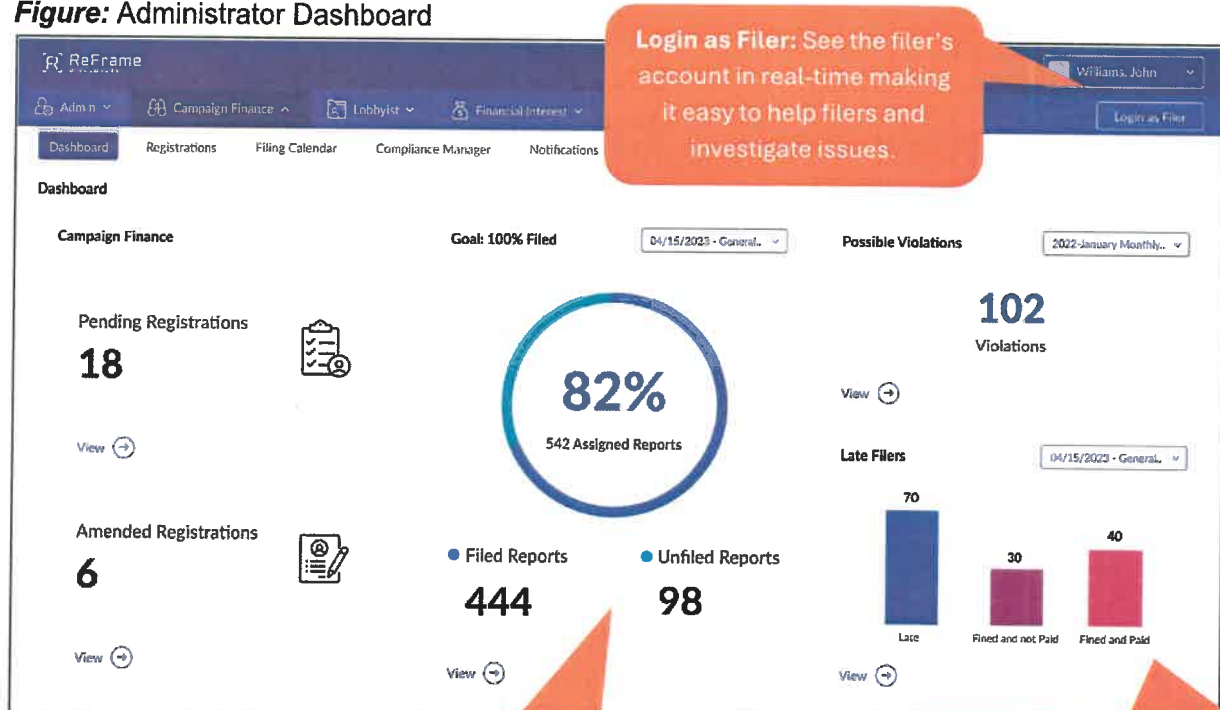


Figure 20 Administrator Dashboard.

Registration Work Queue:
Provides administrators with easy access to tasks for processing registrations, streamlining workflow

Monitor Filing Progress:
Track progress toward a specific disclosure report due date. Drill down to see who has filed and who still needs to submit.

Other Graphical Widgets:
Configured to show metrics important to staff or Management.

Clicking on the View Button ([View](#)) from the Pending Registrations section of the Dashboard will display the Registrations Page where you can approve, conditionally approve, or reject registrations, process amended registrations, or review both accepted and rejected registrations.

The screenshot shows the ReFrame Registrations page. The top navigation bar includes links for Admin, Campaign Finance, Lobbyist, and Financial Interest. The main header shows the user is logged in as Williams, John. The Registrations section has tabs for Pending, Amended, Approved, and Rejected. A search bar labeled 'Search By Name' is present. A table lists registrations with columns for Name, Filer Type, Filing Cycle, Office, Type, and Actions. Two callouts are present: one pointing to the '+ Add Registration' button stating '+ Add Registration: Ability to add filers who have submitted their disclosure reports on paper.' and another pointing to the 'Williams, John M' link in the Name column stating 'Filer Profile: Clicking on the filer link will display the submitted registration information prior to approving.'

Name	Filer Type	Filing Cycle	Office	Type	Actions
Bent, Paula	Candidate	2022 Non-Partisan Election Cycle	District Attorney	New	⋮
Williams, John M	Candidate	2022 Exploratory Committee Cycle	Governor	New	⋮

Figure 21 Registrations Screen where admin users can review and process registrations.

The *Template Manager* feature allows administrative users to create and manage notification templates for system-generated correspondence and notices, including automated emails like pending and accepted registration updates or filing confirmations. Notices can be customized using merge fields, ensuring each message is tailored to the specific filer.

The screenshot displays the 'Add New Template' interface in the ReFrame application. The top navigation bar includes links for Admin, Campaign Finance, Lobbyist, Financial Interest, and a user profile for Williams, John. The main menu shows options like Dashboard, Registrations, Filing Calendar, Compliance Manager, Notifications (selected), Reports, and Late Filers. The 'Add New Template' section is titled 'Notification Template Manager' and 'Add Template'. It features a 'Template Type' dropdown set to 'Courtesy Reminder' and a 'Template Name' field containing 'Candidate Courtesy Reminder'. An 'Import' button is visible next to the name field. Below these is a rich text editor with a heading 'Heading 1' and a toolbar with various formatting options. The editor content includes placeholders for '[Send Date]', '[Filer Name]', '[Filer Address]', and a personalized message: 'Dear [Recipient Name], This is a courtesy reminder that your [Report Name] is due on [Send Date]. Please file in a timely fashion. Kind Regards,'. A 'Preview' button is located at the bottom left of the editor. To the right of the editor is a 'Fields' section titled 'Select Data Source' with a dropdown arrow. Below this, a list of available merge fields is shown: 'Filer Details', 'Send Date', 'Filer Name', 'Filer Address', 'Treasurer Name', 'Recipient Name', and 'Resident Agent Name'. Two red callout boxes provide additional context: one points to the rich text editor stating 'Rich Text Editor: Create templates and notifications with logos, links, images, etc.', and the other points to the merge fields stating 'Merge Fields: Add merge fields to your notifications to generate personalized notifications to your filers.' At the bottom right, there are 'Preview', 'Save', and 'Close' buttons.

Figure 22 Template Manager where admin users can add/edit correspondence templates.

The *Notification Manager* feature contains powerful tools for administrative users to create and send notifications to predetermined recipient groups or a custom recipient list. Plus, easily track all sent notifications in one place for complete visibility. Keep your filers informed and ensure compliance with ease!

The screenshot shows the ReFrame Notification Manager interface. At the top, there's a navigation bar with tabs for Admin, Campaign Finance, Lobbyist, and Financial Interest. The main header includes links to Dashboard, Registrations, Filing Calendar, Compliance Manager, Notifications (active), Reports, and Late Filers. The user is logged in as John Williams.

The **Notification Manager** section has two tabs: **Send Notification** and **Sent Notifications**. Under **Send Notification**, there's a question: "Are you sending a notification that will use a template?" with radio buttons for **Yes** (selected) and **No**.

Below this, there are dropdowns for **Template Type** (set to "Courtesy Reminder") and **Template Name** (set to "Candidate Courtesy Reminder"). The **Subject Line** is "Courtesy Reminder - 2023 Q2 Quarterly Report due on 07/15/2023".

The **Delivery Method** section has checkboxes for **Email** (checked), **SMS**, and **User Notification**.

The **Report Information** section asks: "Will this notification be sent for a specific disclosure report or for a report due date?" with radio buttons for **Specific Report** (checked) and **Report Due Date**.

The **Recipient Group** section has a dropdown for "Select a recipient group." with three options: **Entities who have not Filed** (selected), **Entities who have Filed**, and **All Entities who have a Report**.

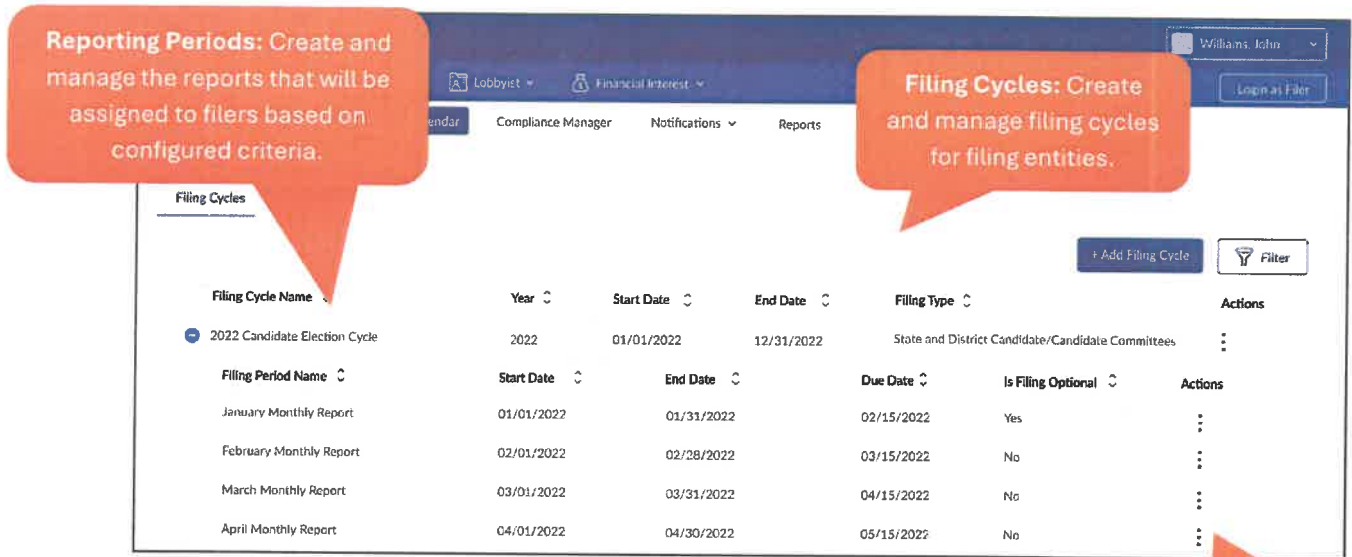
At the bottom, there are three buttons: **Send Notification**, **View Sample Notification**, and **View List of Recipients**.

Three callout boxes highlight key features:

- Top Right:** "Use a pre-made template or create a customized notification on-demand." (pointing to the template selection dropdowns)
- Bottom Center:** "Select a recipient group and view a sample notification" (pointing to the recipient group dropdown and the "View Sample Notification" button)
- Bottom Right:** "Send a notification for a specific report or for a specific due date." (pointing to the "Report Information" section)

Figure 23 Notification Manager where admin users can send correspondence to filers.

The *Filing Calendar* feature contains the functionality for administrative users to create elections, filing cycles, and reporting periods.



Reporting Periods: Create and manage the reports that will be assigned to filers based on configured criteria.

Filing Cycles: Create and manage filing cycles for filing entities.


Filing Cycle Name	Year	Start Date	End Date	Filing Type	Actions
2022 Candidate Election Cycle	2022	01/01/2022	12/31/2022	State and District Candidate/Candidate Committees	

Filing Period Name	Start Date	End Date	Due Date	Is Filing Optional	Actions
January Monthly Report	01/01/2022	01/31/2022	02/15/2022	Yes	
February Monthly Report	02/01/2022	02/28/2022	03/15/2022	No	
March Monthly Report	03/01/2022	03/31/2022	04/15/2022	No	
April Monthly Report	04/01/2022	04/30/2022	05/15/2022	No	

Figure 24 Filing calendar maintenance

From the Action Menu, administrative users can clone a filing cycle for the next election cycle and push corrections or additional reports out to filers.

The *Administrative Reports* feature contains the functionality of managing and monitoring key administrative tasks in one place. It provides powerful tools for tracking filing progress, addressing and investigating potential violations, outstanding fines, and other compliance issues.



Reports

- Filing Status Report**
Displays a list of filed report versus unfiled reports
- Potential Violations Report**
Displays a list of transactions that contains potential violation
- Filing Entity Report**
Displays a list of all filing entities registered in the system
- Admin Account Balance Report**
Displays a list of all filers and the current account balance based on most recent filings
- Fine Status Report**
Displays a list of filers that have fines
- First \$500 Progress Report**
Displays a list of candidates who have reached the first \$500
- Fee, Fine, Payment Report**
Displays a list of all the fees and fines with associated payments

Reports come with customizable filters and real-time data to help administrators simplify processes

Figure 25 Administrative reports.

Lobbyist Module

Online Registration:

Using the Register feature from the Public Portal (above), a lobbyist or firm can create a new lobbying account by following an intuitive step-by-step process. Steps, fields, and rules are configured for each Jurisdiction's needs/statutes.

Figure: Step 1 – Registration Information

ReFrame SOLUTIONS

Lobbyist Individual Registration
Home > Registration Year

1 Registration Information 2 Lobbyist Details 3 Type of Lobbying 4 Client Information 5 Review & Register

Registration Information

Registration Date: 06/07/2024

Registration Type: Individual

Registration For Year: 2024

Based on Statutes we can register Individuals and/or Firms.

Next Cancel

Figure 26 Registration Step 1: Registration information.

Lobbyist Individual Registration
Home > Lobbyist Details

Registration Information (1) | **Lobbyist Details (2)** | Type of Lobbying (3) | Client Information (4) | Review & Register (5)

Lobbyist Details

Title _____ First Name* _____ Middle Name _____ Last Name* _____

Suffix _____

Address Details

Address 1* _____ Address 2 _____

City* _____ State* RF Zip Code* _____

Contact Details

Phone* _____ Mobile _____ Email* _____ Alternate Email _____

Next Back Cancel

Figure 27 Registration Step 2: Lobbyist details.

Figure: Step 3 – Type of Lobbying

Lobbyist Individual Registration
Home > Lobbied Entities

Registration Information (1) | Lobbyist Details (2) | **Type of Lobbying (3)** | Client Information (4) | Review & Register (5)

Type of Lobbying

☐ State Level

☐ State Agency

☐ Local (County, City)

☐ Vendor

☐ State Transportation Board

Other configurable parameters that guide business rules for filing are tailored to the Jurisdiction

Next Back Cancel

Figure 28 Registration Step 3: Type of lobbying.

Figure: Step 4 – Client Information

Lobbyist Individual Registration
Home > Client Information

Progress: 1. Registration Information (✓) 2. Lobbyist Details (✓) 3. Type of Lobbying (✓) 4. Client Information (4) 5. Review & Register (5)

Client Information

Client Name	Address	Phone	Email	Type of Business or Entity	Actions
No data available					

Add one or more clients. + Add Client

Next Back Cancel

Figure 29 Registration Step 4: Client information.

Lobbyist Individual Registration
[Home](#) > [Review & Register](#)

Note: After reviewing your registration information, scroll to the bottom to attest, make payment, and submit.

Registration Information Lobbyist Details Type of Lobbying Client Information **5 Review & Register**

Registration Information Edit

Registration Date 06/07/2024	Registration Type Individual	Registration for Year 2024
--	--	--------------------------------------

Lobbyist Details Easily Edit Any Step Edit

Mr. John Williams

Address Details
2 Waterside Crossing, Windsor RF 06095

Contact Details

Phone 844-473-3726	Mobile 844-473-3726	Email jwilliams@mail.com	Alternate Email 1 smith@xox.com
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Type of Lobbying Edit

State Level

Client Information

Client Name Mary Jane	Address 4525 Pagosa Springs Circle, RF 89098	Phone 844-473-3726	Email maryjane
---------------------------------	--	------------------------------	--------------------------

Registration Fee Details

Note: Lobbyist registration will not be accepted without the payment of the registration fee.

Badge Fee: \$20.00
Supplemental Registration Fee: \$0.00

☐ I hereby swear or affirm under penalty of law that all information on this form is true, correct and complete to the best of my knowledge.

Pay & Submit Back Cancel

Pay and Register: If the Jurisdiction requires a fee for registration, our API-based solution easily integrates with your preferred payment gateway.

Automatically calculates a registration fee for online payment (if applicable).

Figure 30 Registration Step 5: Review and register.

Registration steps differ based on data requirements and lobbying entity registered. Below is an example of an additional step when a Lobbying Firm is registering. It depicts the adding of hired lobbyists for that Lobbying Firm.

Lobbyist Firm Registration
Home > Client Information

Firm Details

Associated Lobbyists

If registering a Lobbying Firm, one or more employed lobbyists can be added to the registration.

Lobbyist	Phone	Mobile	Email	Alternate Email	Actions
Brown, Julie	(480) 208-4144	(480) 463-9898	jbrown@mail.com	jbrown@yahoo.com	

Next Back Cancel

Figure 31 Variations for lobbying firm registration.

Lobbyist Filer Portal:

Lobbyists/Firms login to the Filer Portal using the same method described for Campaign Finance, including Multi-factor Authentication (MFA). The Lobbyist Dashboard provides filers with a centralized and easily accessible overview of their account activities. The filer can access all functionality from their dashboard and drill down to gain additional insight into their account.

ReFrame

Lobbyist: Williams, Rick #1034

Dashboard Account Overview Transactions Reports Public View

Lobbying Year: 2024

Hello, Rick!

Reminders

- 2024 Q2 Quarterly Report Due in 38 days (07/15/2024) [File Now](#) [Preview](#)
- 2024 Q3 Quarterly Report Due in 130 days (10/15/2024) [File Now](#) [Preview](#)
- 2024 Q4 Quarterly Report Due in 222 days (01/15/2024) [File Now](#) [Preview](#)

Reminders: Remind the filer to file reports, pay fines, and renew lobbyist registration.

15 Pending Transactions [View](#)

\$3,500 Total Money Spent [View](#)

3 Unfiled Reports [View](#)

Figure 32 Lobbyist filer dashboard.

The Transactions Page provides a lobbyist with a detailed view of their transactions. Filers can add/edit/delete/amend transactions. The “All Transactions” grid displays all transactions in the account, while the “Pending Transactions” grid displays the transactions at a lobbyist report level that have not been filed.

The screenshot shows the 'Transactions' page in the ReFrame application. The top navigation bar includes 'Dashboard', 'Account Overview', 'Transactions' (selected), 'Reports', and 'Public View'. The 'Lobbying Year' is set to 2024. The 'Transactions' section has two tabs: 'All Transactions' and 'Pending Transactions'. A search bar is present with the text 'Search By Name, Filing Period Or Amount'. A table lists transactions with columns: Transaction Type, Lobbyist Client, Public Servant Benefited, Filing Period, Transaction Date, Amount Paid, Business Relationship, Filed Date, Amended, and Actions. Three transactions are visible: Expenditures, Gifts, and Food, Lodging or Travel. A red callout points to the '+ Add Transaction' button, stating 'Add a new transaction.' Another red callout points to the '+' icon in the 'Amended' column, stating 'The + icon indicates that transaction has been amended, and clicking it will show the history.' A third red callout points to the 'Amount Paid' link, stating 'Lobbyist Transaction: Click on the Amount Link to view full details about the transaction.'

Figure 33 Lobbyist transaction management.

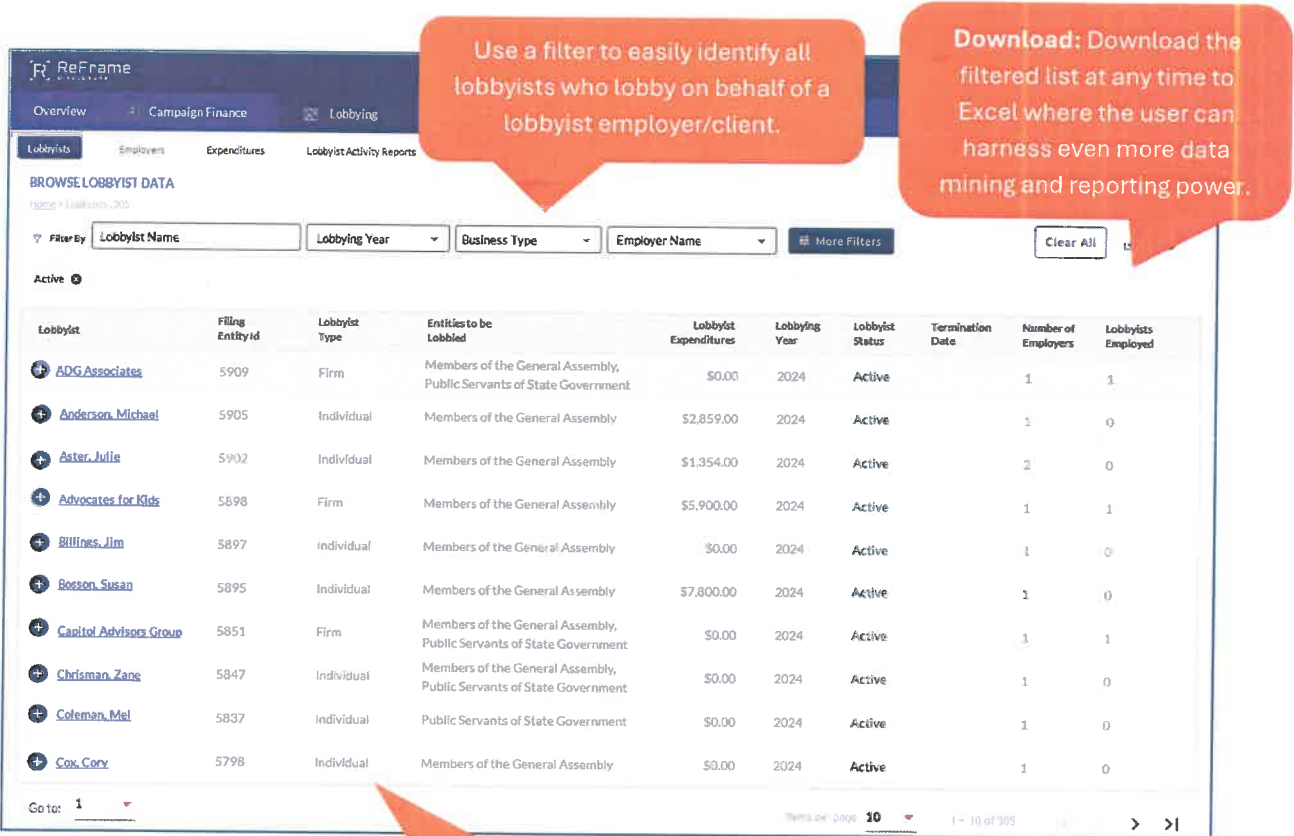
Using the + Add Transaction button, the user can add expenditures, gifts, and other transaction types required by the jurisdiction. All transactions will capture the statutorily required information.

The screenshot shows the 'Add Gift' form in the ReFrame application. The top navigation bar is the same as in Figure 33. The 'Add Gift' section has a breadcrumb 'Transactions > Add Gift'. The form includes fields for 'Date Given', 'Amount Paid towards Expenditure', 'Client/Employer' (a dropdown menu), 'Did the lobbyists share in the cost of this expenditure?' (radio buttons for Yes and No), 'Public Servant Benefited' (fields for First Name, Middle Name, Last Name, and Governmental Body of Public Servant), 'Gift Information' (fields for Description of Gift and Cost of Fair Market Value, List), and 'Save' and 'Cancel' buttons. A red callout points to the 'Client/Employer' dropdown, stating 'Lobbyist Clients: Select the client that is being lobbied on behalf of from the list of clients added to the registration.'

Figure 34 Add/edit transaction.

Public Portal:

Browse Lobbyist Data pages contain summary information about lobbyists, clients, transactions, and filed lobbyist reports. The public or the media can perform research with the application's 100% transparency. Create any data list and download it to a .csv file. Below is an example of the *Browse Lobbyist Data* page containing a list of registered lobbyists.



Use a filter to easily identify all lobbyists who lobby on behalf of a lobbyist employer/client.

Download: Download the filtered list at any time to Excel where the user can harness even more data mining and reporting power.

Lobbyist Profile: Simply click on the lobbyist name link to view the entire filing entity profile including clients lobbied on behalf of and filing history.

BROWSE LOBBYIST DATA

Filter By: [More Filters](#) [Clear All](#)

Lobbyist	Filing Entity Id	Lobbyist Type	Entities to be Lobbied	Lobbyist Expenditures	Lobbying Year	Lobbyist Status	Termination Date	Number of Employers	Lobbyists Employed
ADG Associates	5909	Firm	Members of the General Assembly, Public Servants of State Government	\$0.00	2024	Active		1	1
Anderson, Michael	5905	Individual	Members of the General Assembly	\$2,859.00	2024	Active		1	0
Aster, Julie	5902	Individual	Members of the General Assembly	\$1,354.00	2024	Active		2	0
Advocates for Kids	5898	Firm	Members of the General Assembly	\$5,900.00	2024	Active		1	1
Billings, Jim	5897	Individual	Members of the General Assembly	\$0.00	2024	Active		1	0
Bosson, Susan	5895	Individual	Members of the General Assembly	\$7,800.00	2024	Active		1	0
Capitol Advisors Group	5851	Firm	Members of the General Assembly, Public Servants of State Government	\$0.00	2024	Active		1	1
Chrisman, Zane	5847	Individual	Members of the General Assembly, Public Servants of State Government	\$0.00	2024	Active		1	0
Coleman, Mel	5837	Individual	Public Servants of State Government	\$0.00	2024	Active		1	0
Cox, Cory	5798	Individual	Members of the General Assembly	\$0.00	2024	Active		1	0

Go to: Items per page: 10 1 - 10 of 985 [>](#) [>|](#)

Figure 35 Lobbyist public portal search.

The *Browse Client Data* page displays all the lobbyist employer/clients that are using lobbyists to influence legislation. From the filters, a user can find all the clients in a specific type of business or all clients who are using a specific lobbyist.

BROWSE CLIENT DATA

Home > Clients (1,253)

Filter By: Lobbying Year, Lobbyist Name, Business Type, Client Name

2024

Client / Employer	Address	Business Type	Lobbying Year	No. of Lobbyists
ReFrame Healthcare Association	261 Q Data Drive, Draper, RF 89098	Healthcare	2024	1
11 Series Energy	4525 Pagosa Springs Circle, RF 89098	Construction	2024	1
3M Health info Systems, Inc	575 West Murray blvd, Salt Lake City, RF 89098	Food & Beverage	2024	1
4 Start General Contracting	333 South Avenue, RF 89098	Healthcare	2024	1
420 Dispensary	125W Capitol Avenue, RF 89098	Construction	2024	1
A First Name Basis	ings Circle, RF 89098	Construction	2024	1
A-ve LLC		Healthcare	2024	1
3W Water Systems, Inc		Food & Beverage	2024	1
3W Water Systems, Inc		Food & Beverage	2024	1

Rows per page: 10 1- 10 of 30

Figure 36 Lobbyist public portal client/employer search.

Clicking on a Lobbyist Name Link on any page will display the *Lobbyist Profile* page displays information about the lobbyist, clients that the lobbyist is lobbying on behalf of, reported transactional activity, and filed lobbying activity reports.

ReFrame SOLUTIONS

Overview Campaign Finance Lobbyist Financial Interest

Lobbyists Clients Expenditures Lobbyist Activity Reports Download Bulk Data

LOBBYIST PROFILE

Home > Lobbyists > Lobbyist Profile

Lobbyist Profile

Joe Harris Jr. ACTIVE

LOBBYIST INFORMATION

Filing Entity ID : 8607
 Date Registered : 04/12/2022
 Phone Number : (501) 681-5740
 Email : joe.harris@mail.com
 Address : PO Box 1786, Maumelle, RF 89767
[Lobbyist Registration Form](#)

LOBBIED ENTITIES

- Public Servant of State Government

COMBINED FINANCIAL TOTALS

Category	Amount
Expenditure per Employment :	\$0.00
Gifts :	\$0.00
Food, Lodging or Travel :	\$0.00
Other Items :	\$0.00
Special Events :	\$0.00
Other Expenditures :	\$0.00

View Clients, Expenditures, Reports, and Documents related to the Lobbyist or Firm.

Lobbyist Registration Form: Click on the Lobbyist Registration Form link to view the filed lobbyist registration as a pdf.

Client	Type of Business or Entity	Address	Lobbying Year
ReFrame Healthcare Association	Healthcare	PO Box 1786, Maumelle, RF 89767	2024

Figure 37 Lobbyist detailed profile