

**Response to: State of West Virginia's RFP
CRFP 0506 MIS2600000001**

Produced by: Envision Technology Partners, Inc., and
InductiveHealth Informatics, LLC.,
Business Address: 2870 Peachtree Rd NW #915-3304
Atlanta, GA 30305 - 2918

Telephone Number: (248) 631-6810

Fax Number: 800-991-2996 ATTN: Mailbox #3304

Contact Person: Savannah Baratta

E-mail: Contracts@envisiontechnology.com

Vendor Signature/Date:

Savannah Baratta / March 20th, 2026

Due by: March 24th, 2026 13:30

Submitted by: March 20th, 2026

RECEIVED

2026 MAR 23 AM 10:16

WV PURCHASING
RECEIVED

Table of Contents

Response Reference/Executive Summary	3
Our Company	3
Key Efforts Delivered for West Virginia.....	3
Our Solution Value.....	3
Proposal Organization	4
Technical Proposal	5
Section 4.2: Project Goals and Mandatory Requirements.....	5
Section 4.2.1 Approach & Methodology to CDC Based Goals and Objectives	5
Section 4.2.2 Approach & Methodology to West Virginia Specific Goals/Objectives.....	31
Section 4.2.3 Approach & Methodology to Compliance with Mandatory Project Requirements.....	63
Section 4.3 Qualifications and Experience	90
Section 4.3.1 Qualifications and Experience Information.....	90
Section 4.3.2. Mandatory Qualification/Experience Requirements	98
Attachment 1: Project Schedule	99
Attachment 2: Exceptions to RFP.....	111
Attachment 3: Bidder Binding Statement.....	113
Attachment 4: Addendum Acknowledgement Form.....	115

Response Reference/Executive Summary

Our Company

Envision Technology Partners, an InductiveHealth company, is uniquely positioned to support the State of West Virginia Department of Health in modernizing its Immunization Information System (IIS) as a natural extension of our existing partnership. Since April 2020, InductiveHealth has supported West Virginia’s disease surveillance operations through a secure, SaaS-hosted NEDSS-based system (NBS), delivering Electronic Lab Reporting (ELR), Electronic Case Reporting (eCR), and standards-based data exchange aligned to the state’s public health priorities.

This established partnership creates a meaningful opportunity to bring immunization and disease surveillance systems into closer alignment under a single, trusted partner. By extending this relationship to include IIS, West Virginia can reduce integration complexity, streamline data exchange, and operate more efficiently across programs. This approach enables greater coordination across West Virginia’s public health systems while maintaining the flexibility of a configurable SaaS solution.

Envision currently provides IIS hosting, maintenance, and enhancement services to 21 CDC IIS awardee jurisdictions demonstrating the scale, maturity, and proven performance of our platform across a broad range of public health environments. For more than 24 years, Envision has delivered SaaS-based IIS solutions through its nationally recognized WebIZ™ platform. Envision offers a proven, scalable approach to supporting West Virginia’s modernization efforts with a focus on reliability, interoperability, and long-term program success.

Key Efforts Delivered for West Virginia

Through our ongoing partnership with West Virginia, InductiveHealth has delivered measurable progress in modernizing disease surveillance capabilities and strengthening data exchange across public health programs. Key accomplishments include:

- **Electronic Case Reporting (eCR) Advancement:** Successfully supported progression of eCR into production, including enabling STD conditions reporting and associated line list reporting capabilities.
- **Operational Go-Live Milestones:** Partnered with the state to achieve eCR go-live for priority program areas, expanding real-time case reporting and improving surveillance responsiveness.
- **Ongoing System Modernization and Maintenance:** Completed critical infrastructure updates, including server and operating system patching, as well as implementation of 2025 NNDSS Condition Code Updates to ensure continued compliance with national reporting standards.
- **Expanded Reporting and Data Quality Capabilities:** Delivered enhancements to utilization reporting and established a roadmap for continued improvements, including eCR utilization reporting, data quality monitoring, and ELR/eCR comparison reports.

This work reflects a proven, collaborative partnership with West Virginia and demonstrates Envision’s ability to deliver reliable, standards-aligned solutions that evolve with the state’s public health priorities.

Our Solution Value

Envision’s approach is grounded in delivering reliable, scalable, and cost-effective IIS solutions that meet the day-to-day needs of immunization programs while supporting long-term modernization goals. Our model prioritizes stability, collaboration, and continuous improvement, ensuring jurisdictions receive a solution that works today and evolves with future public health demands.

- **Experience Matters:** Envision currently provides IIS hosting, maintenance, and enhancement services to twenty-one (21) CDC IIS awardee jurisdictions—demonstrating the scale, maturity, and reliability of our platform across diverse public health environments.

- **WebIZ™ Industry Leader:** WebIZ is among the most validated IIS platforms in the country, achieving the highest levels of conformance through AIRA’s Measurement and Improvement initiative—ensuring alignment with national standards and best practices.



- **Community-Driven Model:** Envision’s shared codebase model allows jurisdictions to benefit from enhancements funded across the community, reducing duplication of effort and maximizing the value of investment. This collaborative approach accelerates innovation while maintaining consistency and quality across all implementations.
- **Value Through Collaboration:** Jurisdictions routinely co-fund enhancements, allowing programs to extend limited budgets while benefiting from improvements developed across the broader community. Regular release cycles ensure continuous delivery of new functionality without disruption.
- **Modernization Activities:** West Virginia would be joining our WebIZ Community during an active period of our PHIG IIS modernization activities, gaining immediate access to recent investments in accessibility, scalability, and security without the cost or risk of building these capabilities independently.
- **Data Migration Expertise:** Envision has extensive experience delivering complex IIS data migrations with a disciplined, validation-driven approach. We focus on early data analysis, iterative testing, and close coordination with the jurisdiction to ensure accuracy and completeness. This structured process minimizes risk and enables a smooth, confident transition at go-live.
- **Proven Implementation Approach:** Post contract execution, Envision is proposing a twelve (12) month implementation period. With twenty-one (21) successful implementations and data migrations completed to date, our process has proven effective and ensures that data quality is not sacrificed. Envision delivers a structured, repeatable approach that balances speed, quality, and operational continuity for jurisdiction teams.

Proposal Organization

This proposal is organized into two distinct components: **Technical** and **Cost**. The Cost Proposal is sealed separately and contains all pricing information.

The Technical Proposal follows the structure and requirements outlined in the RFP. For ease of review, Envision has provided the RFP section with references and restated applicable requirements throughout the response.

We appreciate the opportunity to respond and look forward to the potential to expand our partnership with West Virginia in delivering the next generation of WVSIIIS.

Technical Proposal

Section 4.2: Project Goals and Mandatory Requirements

Section 4.2.1 Approach & Methodology to CDC Based Goals and Objectives

Envision’s approach to supporting CDC-based IIS goals and objectives aligns with national standards, proven implementation practices, and continuous advancement of interoperability and data quality. Our WebIZ platform is designed to meet and exceed CDC IIS Functional Standards while maintaining flexibility to adapt to evolving federal guidance and public health priorities within each jurisdiction.

Our methodology focuses on delivering secure, standards-based, and scalable capabilities that will enable West Virginia to maintain compliance, improve data quality, and strengthen electronic data exchange across partners. The following sections outline how Envision’s approach aligns with each CDC-defined goal and objective.

Section 4.2.1.1 Establish and maintain a secure, confidential Immunization Information System

4.2.1.1.1.

Request:

4.2.1.1.1. The IIS is physically and digitally secured in accordance with policies and industry standards for protected health information, security, and encryption.

4.2.1.1.1.1. The IIS establishes, documents, and updates policies and procedures to manage the collective functions, capabilities, and attributes of an IIS.

4.2.1.1.1.2. The IIS establishes and maintains the technical infrastructure to securely capture, store, and process patient demographic and vaccination data consistent with established policies and procedures.

4.2.1.1.1.3. The IIS provides ongoing training to ensure awareness of and to promote adherence to policies and procedures.

Response:

WebIZ is physically and digitally secured. WebIZ is designed, implemented, and operated to ensure the confidentiality, integrity, and availability of protected health information (PHI), in alignment with CDC IIS Functional Standards and recognized industry frameworks such as SOC 2, and applicable federal and state security requirements.

Envision employs a defense-in-depth security model that integrates administrative, technical, and physical safeguards to protect IIS data throughout its lifecycle. WebIZ is secured in the Microsoft Azure Government Cloud. The Azure Government Cloud offers an extra level of value for West Virginia as this is a physically isolated cloud environment dedicated to US federal, state, local, and tribal governments, and their partners. This environment is assessed and authorized at the FedRAMP High impact level and provides an extra layer of protection to customers through contractual commitments regarding storage of data in the United States and limiting potential access to systems processing customer data to screened US persons.

Envision has established documentation and maintains comprehensive policies and procedures governing the secure management, operation, and use of the IIS. These policies address system access, data handling, encryption, incident response, vulnerability management, and system change control. Policies are reviewed and updated periodically to ensure continued alignment with regulatory requirements, evolving security risks, and CDC recommended practices for IIS governance.

WebIZ’s technical infrastructure securely:

- Captures, stores, transmits, and processes patient demographic and vaccination data.
- Enforces encryption of data in transit and at rest.
- Supports secure interfaces for data exchange and interoperability.

Technical safeguards are implemented consistently with documented policies and are validated through ongoing operational and security practices.

Ongoing security and privacy training is provided to all personnel. Training is designed to promote awareness of security responsibilities, reinforce adherence to established policies and procedures, and reduce the risk of accidental or malicious misuse of IIS data. Envision’s training content is updated periodically to reflect changes in system functionality, threat landscape, and regulatory requirements.

4.2.1.1.2.

Request:

4.2.1.1.2. The IIS is physically and digitally secured in accordance with industry standards for disaster avoidance, mitigation, and recovery.

4.2.1.1.2.1. The IIS establishes and maintains the infrastructure needed for disaster avoidance.

4.2.1.1.2.3. The IIS establishes and test recovery plans to mitigate system downtime.

Response:

WebIZ is hosted within secure Microsoft Azure Government data centers that adhere to recognized industry standards for physical security, environmental controls, and operational resilience. Microsoft Azure facilities employ layered physical security protections including 24/7 on-site security personnel, biometric access controls, video surveillance, intrusion detection systems, and multi-factor authentication for facility access. These controls align with ISO 27001, SOC 1 and SOC 2, NIST 800-53, and other applicable federal and industry frameworks.

Digitally, the IIS environment is architected using a defense-in-depth security model. Network segmentation, role-based access controls (RBAC), multi-factor authentication (MFA), encryption in transit and at rest, endpoint protection, and continuous monitoring tools are implemented to protect system integrity and availability. Data encryption meets or exceeds FIPS 140-2/140-3 validated standards where applicable.

High availability is achieved through geographically redundant Azure Government regions and availability zones, ensuring resilience against localized outages. The system is continuously monitored for performance, security events, and infrastructure health to proactively mitigate potential service disruptions.

WebIZ is designed with disaster avoidance principles embedded in its architecture. Key components include:

- **Redundant Infrastructure:** Production workloads are deployed across multiple availability zones within an Azure region to protect against single points of failure. Critical services utilize load balancing and auto-scaling to ensure continuous service availability.
- **Geographic Redundancy:** Data is replicated to secondary Azure regions using geo-redundant storage and database replication technologies to protect against regional disruptions.
- **Automated Infrastructure Deployment:** Infrastructure-as-Code (IaC) methodologies are used to provision and maintain environments consistently, reducing configuration drift and minimizing operational risk.
- **Continuous Monitoring:** System health, performance metrics, and security events are monitored 24/7 using centralized logging and alerting systems to detect and respond to potential issues before they escalate.
- **Regular Backups:** Automated backups of databases and critical system components are performed on a defined schedule, with retention policies aligned to contractual and regulatory requirements

These preventative controls reduce the likelihood of service disruption and ensure operational continuity under adverse conditions.

Envision maintains a documented Disaster Recovery (DR) and Business Continuity Plan (BCP) that defines roles, responsibilities, recovery time objectives (RTOs), and recovery point objectives (RPOs) for critical system components.

Key recovery measures include:

- Documented Recovery Procedures: Step-by-step restoration procedures for infrastructure, applications, and databases.
- Defined RTO/RPO Targets: Recovery objectives are established based on system criticality and contractual obligations. RPO will be near zero with RTO within hours, significantly less than 24 hours as multi-day outages cannot occur for an IIS.
- Geo-Redundant Failover Capabilities: Secondary environments are maintained to enable rapid failover in the event of a primary region outage.
- Regular DR Testing: Disaster recovery exercises are conducted on an annual basis to validate recovery procedures, confirm data integrity, and measure recovery timelines. Findings are documented and used to improve recovery readiness.
- Post-Incident Review Process: Following any significant incident or test event, a formal review is conducted to identify lessons learned and implement corrective actions.

Through proactive planning, documented procedures, and routine testing, Envision minimizes IIS downtime risk and ensures timely restoration of services in the event of disruption.

4.2.1.1.3.

Request:

4.2.1.1.3. The IIS defines service expectation between the program and the entities providing information technology support to ensure system availability and uninterrupted data flows.

4.2.1.1.3.1. The IIS implements service-level agreements between the program and the entities providing information technology and support.

4.2.1.1.3.2. The IIS implements and maintains the infrastructure to fulfill service-level agreements.

Response:

Envision will work closely with the Agency to establish clearly defined service expectations aligned with what was provided in Attachment C of the RFP. Service expectations identify system availability targets, incident response timelines, escalation procedures, change management controls, maintenance windows, data exchange reliability requirements, and security monitoring responsibilities. These documented standards ensure that system availability and data exchange operations, including HL7 interfaces, batch submissions, and real-time messaging, remain reliable and uninterrupted.

To ensure that service expectations are met throughout the lifetime of this contract, operational governance will be implemented. Operational governance activities include regular service review meetings, performance reporting, and continuous improvement processes to ensure that defined expectations are consistently met, objectively reported, and refined as needed.

As the information technology entity responsible for hosting, infrastructure management, application support, database administration, and security operations, Envision will formally document service expectations through service-level agreements (SLAs), operational runbooks, and governance procedures. Combined, these procedures and metrics will ensure high system availability and uninterrupted data flows.

Service-level agreements (SLAs) between the Agency and Envision will be established in our contract. SLAs define:

- System Availability Targets: Clearly defined uptime commitments for production environment.

- Incident Response and Resolution Times: Categorized response times based on severity levels (e.g., critical, high, medium, low).
- Escalation Procedures: Defined communication pathways and notification timelines for system-impacting events.
- Maintenance and Change Management Standards: Scheduled maintenance windows, change approval processes, and rollback procedures.
- Performance Monitoring and Reporting: Regular reporting on system uptime, performance metrics, and incident trends.

These SLAs align with industry best practices and are supported by documented operational procedures to ensure accountability, transparency, and compliance with contractual and regulatory obligations.

Envision’s WebIZ infrastructure and support services consistently meet or exceed established SLAs. Keys to our success include:

- High-Availability Architecture: Deployment across multiple availability zones with load balancing and failover capabilities to minimize downtime.
- Redundant Network and Storage Systems: Geo-redundant data storage and database replication to protect against regional outages.
- Continuous Monitoring and Alerting: 24/7 infrastructure and application monitoring with automated alerting to enable rapid incident response.
- Scalable Infrastructure: Auto-scaling capabilities to support fluctuating transaction volumes and ensure uninterrupted data flows.
- Dedicated Operational Support Teams: Clearly defined responsibilities across infrastructure, application, database, and security teams to ensure rapid resolution of incidents.

Through resilient architecture, proactive monitoring, and defined operational accountability, Envision maintains the infrastructure necessary to consistently achieve its service-level commitments and ensure uninterrupted immunization data exchange.

Section 4.2.1.2 Continuously improve IIS data quality.

4.2.1.2.1.

Request:

4.2.1.2.1. The IIS validates patient demographic and vaccination data.

4.2.1.2.1.1. The IIS supports the identification, prevention, and resolution of duplicate and fragmented patient demographic and vaccination data in accordance with policies and procedures.

4.2.1.2.1.2. The IIS monitors data quality within the IIS in accordance with policies and procedures.

4.2.1.2.1.3. The IIS uses electronic tools to standardize and/or validate addresses in the IIS.

4.2.1.2.1.4. The IIS delivers feedback and training to IIS partners and providers to ensure complete, timely, and accurate patient demographic and vaccination records.

4.2.1.2.1.5. The IIS meets federal and jurisdictional data quality metrics.

Response:

WebIZ validates patient demographic and vaccination data through a combination of real-time validation at ingestion, automated deduplication and record linking, continuous data quality monitoring, address standardization, and partner feedback/training. These capabilities are governed by documented policies, procedures, and data stewardship practices to support complete, timely, and accurate immunization records, and to meet applicable federal and jurisdictional data quality metrics.

WebIZ supports the identification, prevention, and resolution of duplicate and fragmented patient demographic and vaccination data in accordance with policies and procedures:

Approach & Capabilities

- **Duplicate detection and prevention**
 - Performs **deterministic** and **probabilistic/fuzzy matching** on key demographic fields (e.g., name, DOB, sex, phone/email, address, parent/guardian, MRN where available).
 - Supports **real-time “possible match” checks** during inbound message processing and/or interactive entry to reduce duplicate creation.
- **Fragmented record resolution**
 - Identifies all potential duplicate patient records when immunizations are distributed across multiple patient profiles.
 - Provides workflows to review, **merge, or** mark as ‘not duplicates’ with full auditability.
- **Governance & audit**
 - Role-based permissions for merge actions.
 - Maintains an **audit trail** (who, what, when, why) for record consolidation actions.
- **Operational workflows**
 - Queue-based review for potential duplicates.
 - Automated merge feature for high confidence duplicate matches.
 - Batch identification routines to regularly surface duplicates created by data feeds or user entry.

Outcome

- Reduced duplicate patient records, improved continuity of immunization histories, and increased confidence in clinical decision support and reporting.

WebIZ monitors data quality within the IIS in accordance with policies and procedures.

Approach & Capabilities

- **Data quality dashboards and reporting**
 - Tracks completeness, validity, timeliness, and consistency indicators (e.g., missing DOB, invalid CVX codes, invalid lot number formats, impossible dates).
 - Measures and trends quality by **submitter, facility, interface, message version, and time period.**
- **Rule-based validation**
 - Applies validation rules for inbound demographic and vaccination content (e.g., required fields, allowed values, format checks, logical checks like administered date not in the future).
 - Flags non-conforming records and routes them to exception handling.
- **Exception and error management**
 - Captures ingestion errors/warnings with actionable details (e.g., field-level error messages).
 - Supports reprocessing workflows after partner corrections.
- **Data stewardship processes**
 - Data quality reviews are performed on a defined cadence (quarterly) with documented procedures and escalation paths.
 - Supports continuous improvement through targeted outreach to partners with recurring issues.

Outcome

- Continuous visibility into data health and timely corrective actions to prevent quality degradation.

WebIZ uses electronic tools to standardize and/or validate addresses in the IIS.

Approach & Capabilities

- **Address standardization**
 - Uses electronic address validation (Smarty) and normalization to standardize:
 - street formatting (abbreviations, casing)
 - city/state/ZIP coherence
 - ZIP+4 when available
- **Data quality improvements**
 - Identifies invalid or incomplete addresses (e.g., missing ZIP, non-existent street/city combinations).
 - Supports workflows to correct or request updated addresses from submitters.
- **Operational support**
 - Improves jurisdictional reporting, outreach activities, reminder/recall initiatives, and reduces returned mail/failed outreach.

Outcome

- Cleaner demographic records, improved matching accuracy, and better reporting/communications.

WebIZ delivers feedback and training to IIS partners and providers to ensure complete, timely, and accurate patient demographic and vaccination records.

Approach & Capabilities

- **Partner performance feedback**
 - Provides partner-facing dashboards and reports showing:
 - message acceptance rates
 - validation error categories and counts
 - timeliness metrics (e.g., time from administration to submission)
 - completeness measures (e.g., missing vaccine lot number, missing patient phone/address)
 - Supports scheduled distribution and ad hoc reporting as needed.
- **Training and enablement**
 - Delivers onboarding and refresher training (live and/or recorded) tailored to role:
 - clinical staff (data entry best practices)
 - technical teams (interface specs, error troubleshooting)
 - administrators (reporting, correction workflows)
 - Maintains a knowledge base (e.g., error code guides, data entry guidance, HL7 field mapping tips).
- **Support and escalation**
 - Provides a structured support process (help desk/ticketing), service levels, and escalation paths for persistent quality issues.
 - Offers targeted outreach to high-impact submitters and repeat error patterns.

Outcome

- Increased partner compliance, fewer errors at the source, and sustained data quality improvements.

WebIZ meets federal and jurisdictional data quality metrics.

Approach & Capabilities

- **Alignment to required metrics**
 - Supports tracking and reporting against required federal and jurisdiction-specific measures (e.g., completeness, timeliness, deduplication rates, data exchange participation).

- Produces exportable reports and supporting documentation for audits and compliance reviews.
- **Continuous improvement process**
 - Establishes baselines, monitors trends, and initiates remediation plans when performance falls below targets.
 - Supports corrective action plans with measurable outcomes (e.g., reducing specific error types by submitter).
- **Documentation**
 - Maintains policies and procedures that define:
 - data validation rules and thresholds
 - duplicate resolution processes
 - partner quality engagement expectations
 - reporting cadence and owners

Outcome

- Demonstrated compliance with applicable metrics and auditable processes for ongoing adherence.

Section 4.2.1.3 Promote electronic data exchange between the IIS and its partners and providers.

4.2.1.3.1.

Request:

4.2.1.3.1. Manage interfaces for exchange and integration of data electronically between the IIS and other information systems in accordance with federal and jurisdictional standards.

4.2.1.3.1.1. The IIS exchanges data in accordance with current interoperability standards endorsed by CDC for message content, format, and transport.

4.2.1.3.1.2. The IIS actively recruits, enrolls, and onboards IIS partners and providers for electronic data exchange.

4.2.1.3.1.3. The IIS actively monitors and evaluates data submitted via electronic data exchange.

4.2.1.3.1.4. The IIS investigates and resolves electronic data exchange errors and anomalies with IIS partners and providers.

Response:

Our WebIZ IIS solution is designed to expand, strengthen, and sustain electronic data exchange across all provider and partner types. The system is built on a standards-driven architecture aligned with national guidance, including the CDC's *Local Implementation Guide for HL7 v2.5.1 Immunization Messaging, Version 1.5*, and incorporates current Release 1.5 updates to ensure conformance with required message structure, content, and transport.

Envision has extensive experience supporting high-volume, standards-based public health data exchange. WebIZ supports a broad range of electronic interfaces, including 129 IIS-to-IIS exchanges through the CDC IZ Gateway, federal partners such as the Veterans Health Administration (VHA), and specialized exchanges such as EDN/RIISE. In addition, WebIZ supports automated data submissions to CDC for COVID-19, influenza, and routine vaccination reporting, and integrates with state and jurisdiction-approved external partners.

Beyond immunization reporting, WebIZ supports interoperability with VTrckS through phased API implementation, standard interfaces between IIS and NBS, and integrations with state-based Health Information Exchanges (HIEs) and Master Client Index (MCI) systems. These integrations support consistent identity management, coordinated surveillance, and cross-system data use.

This standards-aligned foundation, combined with defined onboarding processes, monitoring, and operational governance, enables partners to connect efficiently, exchange high-quality data, and maintain consistent, accurate reporting across all electronic interfaces.

WebIZ fully supports all CDC-endorsed interoperability standards, including HL7 v2.5.1 immunization messaging, required VXU, QBP/RSP, and ACK message types, and secure transport protocols such as SOAP, REST, and HTTPS. The system has successfully passed validation and onboarding across all jurisdictions in which it operates, demonstrating consistent compliance with national and jurisdictions specific implementation guides. WebIZ is aligned with the CDC IZ Gateway IIS to IIS Technical Specification document and Functional Requirement document.

The IIS employs a structured and proactive recruitment and onboarding program to expand participation in electronic data exchange. Providers and partners are supported through enrollment, readiness assessment, credentialing, testing, and production activation. WebIZ includes built-in tools and workflows that assist jurisdictional staff in managing and guiding new senders through each stage of onboarding, ensuring a consistent and efficient experience. To further reduce administrative burden, WebIZ is preparing for a transition to conducting onboarding directly in the production environment beginning in late 2026. This approach minimizes duplicative effort, streamlines the onboarding lifecycle, and accelerates the time it takes for providers to begin exchanging high-quality data. Clear documentation, standardized processes, and dedicated support ensure that organizations can connect quickly and maintain reliable, standards-aligned reporting.

WebIZ actively monitors and evaluates data submitted through electronic data exchange in accordance with CDC IIS Functional Standards and jurisdictional policies to ensure completeness, accuracy, timeliness, and conformance. WebIZ applies automated validation and monitoring to all inbound HL7 messages. Data quality indicators—including completeness, validity, timeliness, and consistency—are tracked through PowerBI dashboards and reports. Common issues such as missing required demographic elements, invalid CVX codes, improper lot number formats, and illogical administration dates are identified and trended by submitter, facility, interface, message version, and time period. Rule-based validation is enforced on all inbound demographic and vaccination data. Required fields, allowable values, formatting rules, and logical checks are evaluated during message processing. The IIS captures and manages electronic data exchange errors and anomalies through structured exception handling workflows. Failed or partially accepted messages are flagged, logged, and made available for review.

The IIS investigates and resolves electronic data exchange errors and anomalies in coordination with IIS partners and providers, in accordance with CDC IIS Functional Standards and jurisdictional procedures. WebIZ captures electronic data exchange errors and warnings generated during HL7 message processing and makes them available for review through structured exception management tools. Errors are categorized and logged with actionable, field-level detail to support efficient diagnosis and resolution. Validation results and processing outcomes are communicated to submitting partners through HL7 acknowledgments (ACKs), including custom ACK codes and descriptive error messages that identify the cause of rejection or warning. This feedback enables partners to correct issues at the source and resubmit data in a timely manner.

The IIS supports defined workflows for investigating recurring or anomalous errors, including trending by submitter, interface, message version, and error type. These workflows support targeted outreach and coordinated resolution with partners when systemic issues are identified.

WebIZ maintains internal technical oversight of HL7 processing. The IIS team reviews message processing behavior and validation logic as needed and makes updates to ensure continued standards conformance and successful message consumption. When changes are made that may impact submitters, partners are notified in advance and provided with clear guidance to support continued interoperability. These capabilities ensure that electronic data exchange issues are investigated, communicated, and resolved efficiently, supporting reliable data submission and sustained data quality across all interfaces.

Section 4.2.1.4 Ensure the delivery of immunization services reflects current ACIP recommendations

4.2.1.4.1.

Request:

4.2.1.4.1. The IIS supports pediatric, adolescent, and adult immunization forecasts consistent with Advisory Committee on Immunization Practices (ACIP) recommendations.

4.2.1.4.1.1. The IIS establishes and maintains Clinical Decision Support (CDS) functionality consistent with ACIP recommendations.

4.2.4.1.2. The IIS establishes and maintains Clinical Decision Support functionality in alignment with CDSi resources published on the CDC website.

Response:

WebIZ supports immunization evaluation and forecasting for pediatric, adolescent, and adult populations consistent with Advisory Committee on Immunization Practices (ACIP) recommendations. WebIZ is built using the CDC-published Clinical Decision Support for Immunization (CDSi) logic specifications and utilizes the published CDSi Supporting Data, which translate ACIP immunization schedules into computable rules governing dose validity, timing, intervals, precautions, and contraindications.

WebIZ establishes and maintains Clinical Decision Support (CDS) functionality that is consistent with ACIP recommendations by implementing CDS logic derived from the CDC CDSi specifications and Supporting Data, ensuring standardized immunization evaluation and forecasting.

WebIZ's CDS functionality is aligned with CDC-published CDSi resources, which provide implementation-neutral logic specifications and supporting data maintained by the CDC. This alignment ensures consistent, computable immunization clinical decision support that is updated as ACIP guidance evolves.

Section 4.2.1.5 Ensure appropriate user access to data

4.2.1.5.1.

Request:

4.2.1.5.1. The IIS ensures authorized users have access to patient demographic and vaccination data based on user roles and permissions.

4.2.1.5.1.1. The IIS implements confidentiality policies that protect the privacy of individuals whose data is contained in the system.

4.2.1.5.1.2. The IIS implements comprehensive account management policies consistent with industry security standards.

4.2.1.5.1.3. The IIS supports technical attributes for the set up and access of user roles and permissions.

4.2.1.5.1.4. The IIS provides user access in accordance with policies and procedures.

4.2.1.5.1.5. The IIS supports authorized 11S partners' and providers' appropriate access to data in the IIS for public and population health purposes (e.g. childcare, schools, college, health plans, clinics).

4.2.1.5.1.6. The IIS provides training that covers accessing patient demographic and vaccination data.

4.2.1.5.1.7. The IIS identifies and inactivates user and site accounts when they are no longer active or no longer authorized to access the system.

Response:

WebIZ ensures authorized users have access to patient demographic and vaccination data based on user roles and permissions.

Approach & Capabilities

- WebIZ enforces role-based access control (RBAC) to ensure users can only access the data and functions necessary for their job responsibilities and authorized purpose.

- Access is governed by jurisdictional policies and procedures, including eligibility criteria, permitted uses, and minimum necessary access principles.
- The system supports granular permissions (e.g., read-only vs. edit; patient search vs. reporting; immunization entry vs. inventory) and can be configured by user type and organization.

Outcome

- Appropriate, auditable access to IIS data aligned to authorized public health and clinical use cases.

WebIZ implements confidentiality policies that protect the privacy of individuals whose data is contained in the system.

Approach & Capabilities

- WebIZ operates under documented confidentiality and privacy policies addressing:
 - authorized uses and disclosures of IIS data
 - workforce confidentiality obligations
 - sanctions for unauthorized access or misuse
 - secure handling of sensitive information
- Users must acknowledge terms of use/confidentiality agreements prior to receiving access (as required by policy).
- WebIZ supports privacy protections such as:
 - role-based restrictions on sensitive functions and views
 - audit logging to detect inappropriate access
 - procedures for responding to suspected privacy incidents

Outcome

- Privacy and confidentiality are embedded into access governance and user accountability processes.

WebIZ implements comprehensive account management policies consistent with industry security standards.

Approach & Capabilities

- The IIS maintains account management policies and procedures covering:
 - identity verification and onboarding
 - approval workflows and authorization requirements
 - password and authentication requirements (or single sign-on where applicable)
 - account lifecycle management (create, modify, suspend, deactivate)
 - privileged/admin account controls
- Security features support industry-aligned practices such as:
 - multi-factor authentication (MFA) where available/required
 - least privilege role assignment
 - session timeouts and automatic logout
 - account lockout or risk-based controls following repeated failed login attempts
- Changes to access are controlled through formal requests and documented approvals, consistent with policy.

Outcome

- Strong governance of user identities and permissions, reducing risk of unauthorized access.

WebIZ supports technical attributes for the set up and access of user roles and permissions.

Approach & Capabilities

- WebIZ provides administrative tools to:
 - create/manage users and organizations/sites
 - assign roles and permission sets

- restrict access by organization, site, or partner type (as applicable)
- maintain separation of duties (e.g., admin vs. standard user)
- Supports technical controls such as:
 - configurable role templates (e.g., provider clinical user, school nurse, childcare, health plan analyst, IIS admin)
 - scoped reporting permissions
 - audit trails for permission changes

Outcome

- Efficient and consistent administration of roles and permissions at scale, with strong traceability.

WebIZ provides user access in accordance with policies and procedures.

Approach & Capabilities

- WebIZ follows documented procedures for provisioning that include:
 - verifying eligibility and purpose
 - confirming organizational affiliation
 - obtaining required approvals (e.g., org/site administrator, IIS program approval)
 - ensuring completion of required training prior to activation (as applicable)
- Access requests, modifications, and removals are tracked via established workflows (e.g., ticketing or access request process), supporting audit readiness.

Outcome

- Controlled, policy-driven access provisioning with clear accountability.

WebIZ supports authorized IIS partners' and providers' appropriate access to data in the IIS for public and population health purposes (e.g., childcare, schools, college, health plans, clinics).

Approach & Capabilities

- WebIZ supports differentiated access models by partner type to align with policy and permitted use, including:
 - clinical/provider organizations: patient-level query, immunization entry/update, reporting
 - schools/childcare/colleges: access limited to eligibility verification and immunization compliance workflows as authorized
 - health plans/public health programs: population-level reporting and outreach support, including de-identified/aggregate reporting as required
- Access can be scoped by:
 - geographic/jurisdictional boundaries (if applicable)
 - organization or site affiliation
 - function (query-only vs. submit/update vs. report)
 - dataset visibility (e.g., minimum necessary elements)

Outcome

- Partners can support public and population health needs while maintaining privacy and policy compliance.

WebIZ provides training that covers accessing patient demographic and vaccination data.

Approach & Capabilities

- Training includes role-appropriate content such as:
 - how to log in and navigate the IIS
 - patient search and record access procedures
 - interpreting immunization histories and forecast/recommendation outputs (if applicable)
 - data entry standards and correction workflows (for users with edit permissions)

- privacy/confidentiality requirements and acceptable use
- Training delivery methods may include:
 - onboarding sessions (live/virtual)
 - recorded modules and job aids
 - quick reference guides for common workflows
 - periodic refreshers and updates when system changes occur

Outcome

- Users understand how to appropriately access and use IIS data and comply with privacy expectations.

WebIZ identifies and inactivates user and site accounts when they are no longer active or no longer authorized to access the system.

Approach & Capabilities

- The IIS supports account lifecycle controls to prevent stale access, including:
 - deactivation of accounts upon separation from an organization or loss of authorization
 - periodic access reviews/recertification by organization/site administrators and/or IIS administrators
 - automatic identification of inactive accounts based on defined inactivity thresholds (per policy) and administrative action to disable as appropriate
- The IIS maintains logs and reports to support:
 - identification of dormant accounts
 - review of last login/activity
 - validation of continued affiliation and role appropriateness
- Supports immediate suspension for security concerns or policy violations, consistent with incident response procedures.

Outcome

- Reduced risk associated with inactive accounts and improved compliance with security policies.

Section 4.2.1.6 Support the generation and use of IIS data through various channels and formats

4.2.1.6.1.

Request:

4.2.1.6.1. The IIS supports the reporting needs of federal and jurisdictional immunization programs.

4.2.1.6.1.1. The IIS provides standard and ad-hoc reports to meet federal and jurisdictional reporting requirements.

Response:

WebIZ supports the reporting needs of federal and jurisdictional immunization programs.

Approach & Capabilities

- WebIZ is designed to support routine, ad-hoc, and program-specific reporting required by federal and jurisdictional immunization initiatives.
- Reporting capabilities are aligned with public health use cases, including:
 - immunization coverage and uptake
 - vaccine inventory and administration trends
 - program performance and compliance reporting
- WebIZ supports policy-driven data access, ensuring reports are available only to authorized users and aligned with permitted uses of data.
- Reporting functionality supports multiple levels of aggregation (e.g., statewide, jurisdictional, organizational, age cohort, geography), consistent with policy.

Outcome

- Immunization programs are able to monitor performance, meet oversight and funding requirements, and support data-driven public health decision-making.

WebIZ provides standard and ad-hoc reports to meet federal and jurisdictional reporting requirements.

Approach & Capabilities

- Standard reports
 - WebIZ provides a library of predefined reports commonly required by federal and jurisdictional immunization programs.
 - Reports are configurable by parameters such as:
 - date range
 - vaccine group or CVX code
 - age group or cohort
 - geography or organization
 - Standard reports support consistent, repeatable reporting and trend analysis over time.
- Data formats and delivery
 - Reports can be viewed within the IIS and/or exported in commonly used formats (e.g., CSV, Excel, PDF) to support analysis and submission workflows.
 - Supports on-demand report generation, as permitted by role and policy.
- Data quality and transparency
 - Reports reflect validated IIS data and align with established data definitions.
 - Documentation or metadata is available to support interpretation of report measures and limitations.

Outcome

- Federal and jurisdictional reporting requirements are met efficiently, with the flexibility to respond to evolving public health needs.

4.2.1.6.2.

Request:

4.2.1.6.2. The IIS supports ad-hoc queries of patient demographic and vaccination data.

4.2.1.6.2.1. The IIS supports direct access for internal authorized users to IIS databases for data extracts and queries in accordance with policies and procedures.

4.2.1.6.2.2. The IIS supports access to data for data visualization, presentation, and analysis.

Response:

WebIZ supports ad-hoc queries of patient demographic and vaccination data. There are two (2) primary methods of running ad-hoc queries in WebIZ. Authorized IIS staff can execute ad-hoc queries directly against a synchronized WebIZ replica database. This allows your program to work with large sets of patient and vaccination data during normal business hours, without negatively impacting system performance in your Production environment.

For authorized IIS staff who are less technical in nature, WebIZ also provides a Query Manager feature in the user interface that allows them to upload an ad-hoc query written by another team member. This feature also allows the ad-hoc query to run on a defined schedule (daily, weekly, etc.). This option is best suited for querying smaller patient and vaccination data sets since it runs against the Production database.

To assist with ad-hoc query creation, Envision provides clients with an up-to-date WebIZ data dictionary. This document provides all WebIZ database tables and references needed to successfully write ad-hoc queries. If necessary, Envision can also assist your team with writing or executing custom ad-hoc queries.

In addition to ad-hoc queries, Envision provides WebIZ clients with advanced analytics and visualizations via Microsoft Power BI. Our pre-loaded Power BI Dashboards/Analytics module is embedded within the WebIZ user interface. Authorized users have self-service access to numerous dashboards, including:

- Change Requests
- HL7 Data Insight
- Providers and Clinic Audits

- COVID-19
- Data Quality
- Duplicate Vaccinations
- Enrollment
- FLU Coverage
- HL7 Messages
- Immunization Rates
- Patient Merges and Duplicates
- Provider User Compliance
- Public Portal
- Smart Health Cards
- Smarty
- Vaccine Report
- Vaccine Inventory Report



Authorized users can manually filter each dashboard, as necessary, and the associated results and data visualizations are updated instantly. For advanced Power BI users, Envision also provides desktop access to Power BI. This allows IIS staff to go beyond the pre-loaded dashboards and create custom visualizations that can be used in Agency presentations and in support of other data quality initiatives.

Value-Added, Alternative Solution: WebIZ offers modern data access solutions that exceed traditional read-replica capabilities. Our analytics-optimized endpoints provide access to a curated "golden dataset" with pre-calculated clinical values (CDSi evaluations, forecasts, age-at-event) in an intuitive, easy-to-understand data model. This is the same curated dataset that powers all InductiveHealth reports and dashboards, ensuring consistent numbers across all analytics and self-service reporting. Users can query this data directly through familiar tools like Power BI, Tableau, Excel, Python, and cloud platforms (Databricks, Snowflake) without creating additional copies or performing data transformations. The solution operates on a fully isolated infrastructure that prevents any impact on production IIS operations. IIS staff do not need to be SQL experts; InductiveHealth provides training and support through Analytics Office Hours.

4.2.1.6.3.

- Request:**
- 4.2.1.6.3.** The IIS supports investigation and reporting of vaccine adverse events.
 - 4.2.1.6.3.1.** The IIS supports vaccine adverse event investigation.
 - 4.2.1.6.3.2.** The IIS refers users to appropriate resources to support adverse event documentation.

Response:

WebIZ supports the investigation and reporting of vaccine adverse events. Authorized users can document Adverse Reactions on any vaccination record entered in WebIZ. This simple process is completed in just a few steps on the 'Immunizations' page. Authorized users are also provided with a direct link to the Centers for Disease Control and Prevention's (CDC) Vaccine Adverse Event Reporting System (VAERS) on the same page. This allows them to easily navigate directly to the VAERS to submit an adverse event report for national surveillance purposes.

PATIENT, EXAMPLE ID: 1067779 | DOB: 04/01/2007 | AGE: 16Y 10M 22D | GENDER: M + Allergy / Risks ARE specified

Immunizations i Learn More

Cancel | Links | Update Add Return

Vaccine Adverse Event Reporting System (VAERS)

Adverse Reaction 1

Adverse Reaction? (Note: Reaction Date, Reaction, Severity, and Clinic must all be specified)

Reaction Date: 11/25/2025 Date Reported To VAERS: 11/25/2025

Reaction*: SEIZURES LESS THAN 3 DAYS Severity*: MILD Consequence: REQUIRED EMERGENCY ROOM/DOCTOR VISIT

Clinic*: KYLE'S TYPE 2 TEST CLINIC Recorded By: [Redacted]

Note: If this patient's adverse event is also an Allergy / Risk to future vaccinations, please record the appropriate entry in the following field to create an Allergy / Risk entry for the patient.

Allergy / Risks: [Empty field]

Comments: [Empty field]

Adverse Reaction 2

Adverse Reaction? (Note: Reaction Date, Reaction, Severity, and Clinic must all be specified)

Reaction Date: [MM/DD/YYYY] Date Reported To VAERS: [MM/DD/YYYY]

Reaction*: [Empty] Severity*: [Empty] Consequence: [Empty]

Adverse events that are recorded in WebIZ are saved to the patient's record. A link to the adverse reaction is stored on all WebIZ pages associated with this specific patient. The intention of this alert is to bring awareness to the previously documented adverse event and prevent an additional dose of the same vaccine being administered to the patient.

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 18 Years 10 Months 22 Days | GENDER: MALE + Allergy / Risks ARE specified

Immunizations Home i

Links | Admin Tools | Select Action

Meningococcal B OMV HPV9
Tdap, Adsorbed MCV4O/MCV4P (Menveo)
COVID-19 (PFR) 12+yrs

Please do not rely solely on the Recommender to forecast immunizations. Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <https://www.cdc.gov/pinkbook/fcp/table-of-contents/index.html>

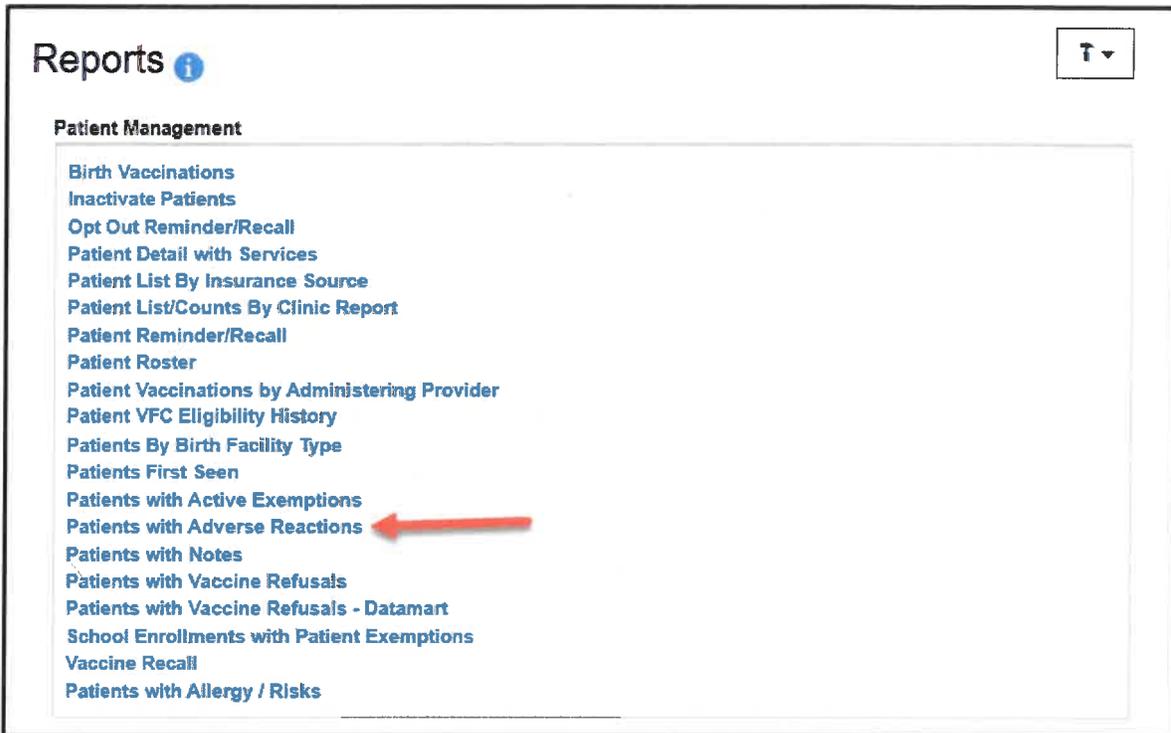
Auto-Populate Add Vaccines Screen

Patient Immunizations

<input type="checkbox"/> Vaccine	Dose	Date	Age	Clinic	Icons	Alert	Action
<input type="checkbox"/> Hep B, ped/adol	1	11/25/2025	18 Years 7 Months 24 Days	KEC24	-	?	VIEW

→ This dose has a reaction

To further support adverse event investigation, tracking, and follow ups, WebIZ includes a 'Patients with Adverse Reactions' report that allows authorized users to identify patients with a documented adverse event. The output provides all relevant patient information and adverse event details.



4.2.1.6.4.

Request:

4.2.1.6.4. The IIS supports the ability to generate coverage reports that users can access without assistance from IIS staff.

4.2.1.6.4.1. The IIS provides access to data to assess vaccination coverage and identify vulnerable populations.

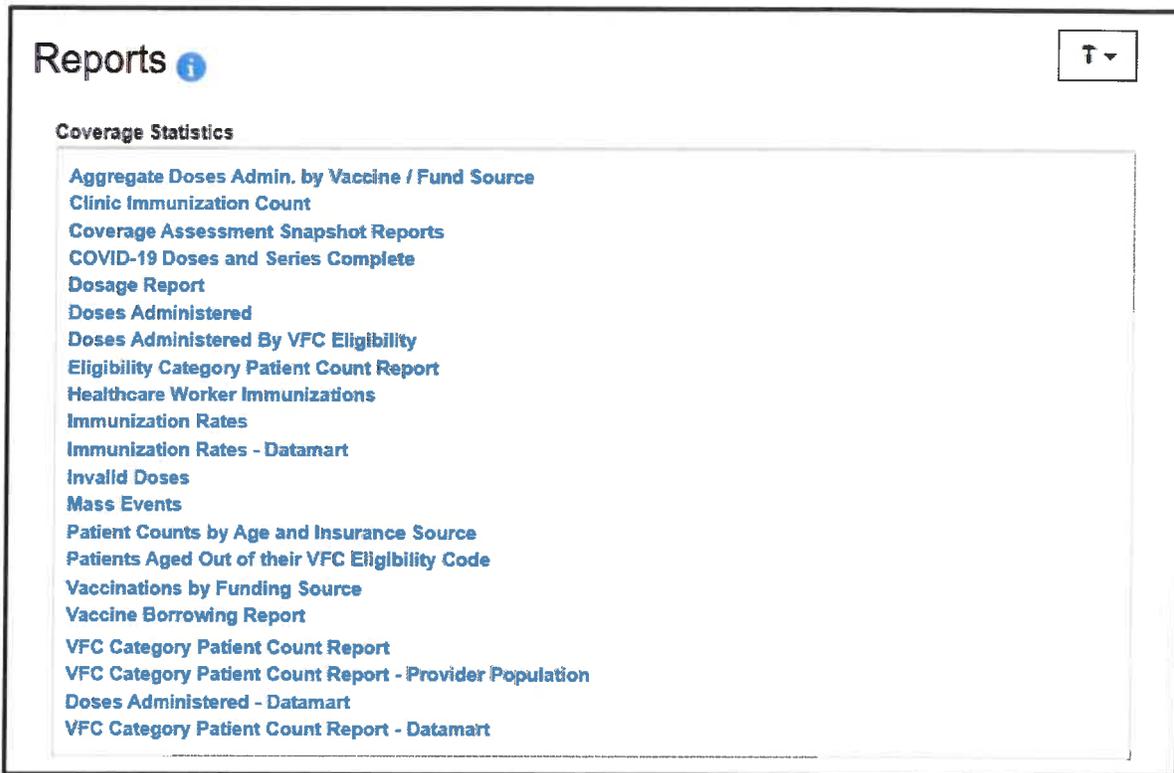
4.2.1.6.4.2. The IIS manages patient status at provider site and jurisdiction levels.

4.2.1.6.4.3. The IIS provides HS-related training on accessing, generating, and interpreting reports.

4.2.1.6.4.4. The IIS supports compliance with immunization requirements in childcare, school, and college settings.

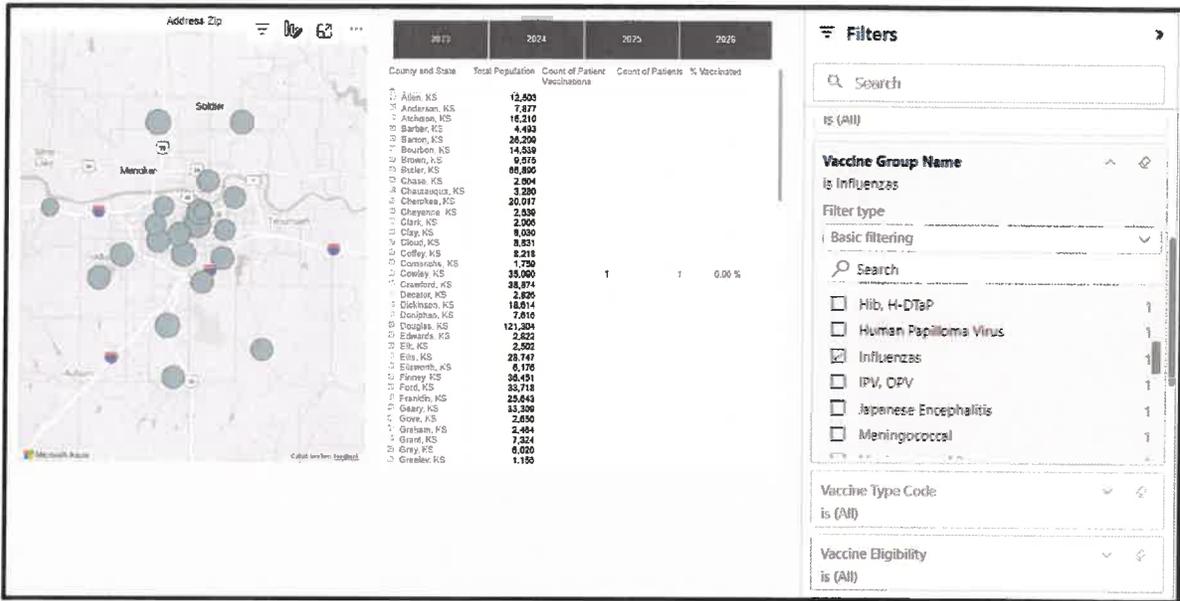
Response:

WebIZ supports the ability to generate coverage reports that users can access without assistance from IIS staff. Envision provides IIS staff and users with a robust suite of easy-to-generate coverage reports. Below is a list of currently available WebIZ Coverage Statistics reports:



In addition, Envision generates statewide Coverage Assessment Snapshot Reports in support of Immunization Quality Improvement for Providers (IQIP) reporting every six (6) months. The snapshot reports utilize Master Rate Comparison Data for all Providers and Clinics in WebIZ. These reports are extremely helpful when IIS staff complete site visits and in performing outreach activities. IIS staff can also create custom IQIP templates in WebIZ that allow you to identify your own vaccination coverage benchmarks for patients of all ages. Coverage Assessment Snapshot Reports provide great value when tracking Provider/Clinic-level progress across pre-visits, primary visits, and follow-up visits.

Value-Added, Alternative Solution: Envision has created a Vaccination Coverage dashboard in Power BI that allows IIS staff to quickly identify vulnerable populations. IIS staff have numerous filtering options, and the associated table results are summarized by county. Users can drill into associated heat maps, allowing you to further determine which municipalities have the highest and lowest vaccination coverage rates statewide.

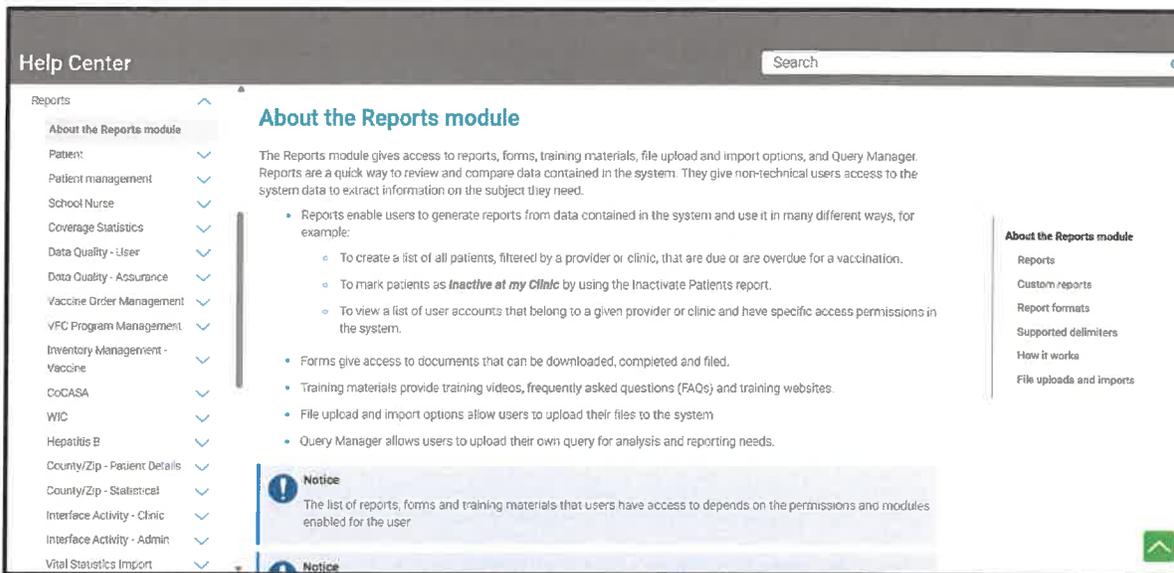


WebIZ tracks patient status at both the jurisdictional and Provider/Clinic level. This two-tiered status tracking system aligns to industry-best IIS standards and allows jurisdictions to actively assess their active residents and active patients associated with specific Provider/Clinics.

This screenshot shows a patient record for 'EXAMPLE PATIENT' (ID: 1067778, DOB: 04/01/2007, AGE: 18Y 10M 22D, GENDER: M). The 'Patient Programs' section shows the patient is associated with 'KYLE CLINIC TYPE 3' and has an 'ACTIVE' status as of 02/05/2026. A 'Select Action' button is visible.

This screenshot shows the same patient record for 'EXAMPLE PATIENT' (ID: 1067779, DOB: 04/01/2007, AGE: 18Y 10M 22D, GENDER: M). The 'Patient Programs' section shows the patient is associated with 'KYLE CLINIC TYPE 3' but has an 'INACTIVE' status. The reason for inactivity is 'OUTSIDE JURISDICTION'. A 'Select Action' button is visible.

Training is a key component of successful IIS implementations. To support your IIS staff's ability to generate and understand WebIZ reports, Envision will provide comprehensive training during the implementation phase of the project, and on ad-hoc basis post go-live. The goal of these training sessions is to build up your comfort levels by generating reports in WebIZ. Training will be conducted using a variety of methods, including but not limited to in-person, virtual, and training videos. For those needing additional support, the Help Center within the WebIZ user interface also provides a detailed explanation of how to interpret many of the most used reports.



Envision works closely with each client to identify state-specific immunization requirements for childcare, school, and college settings. Prior to go-live, Envision will add a West Virginia-specific 'Official Immunization Record' and 'Official School Certificate' reports in WebIZ that is fully aligned to our state's immunization requirements. The WebIZ Public Portal application (consumer access) allows parents/guardians and college students to retrieve these reports via self-service. Finally, the WebIZ Education module allows school nurses to locate student vaccination records to confirm state vaccination compliance and construct student rosters for district wide tracking.



4.2.1.6.5.

Request:

4.2.1.6.5. The IIS supports reminder/ recall activities.

4.2.1.6.5.1. The IIS supports conducting reminder/recall activities without assistance from IIS staff.

Response:

WebIZ supports reminder/recall activities. Reminder/recall is an essential IIS function. WebIZ reminder/recall functionality has been built with flexibility in mind, allowing authorized users to build out their report criteria based on the unique nature of each reminder and/or recall event.

There are several reminder/recall outputs available in WebIZ:

- **Clinic Users:** Authorized clinic users can generate reminder/recall output for patients that have an active status with their clinic in WebIZ. Users are provided with numerous report criteria to utilize, to account for a wide range of potential reminder/recall reasons.
- **School Nurses:** This school specific version of the reminder/recall report is used exclusively by authorized school nurse users. Authorized school nurse users can filter the reminder/recall report based on school district information and active student rosters, supporting vaccination school entry requirements.
- **Agency Users:** This enhanced version of the reminder/recall report allows authorized IIS staff to run reminder/recall output using county and/or zip code values. Agency staff can generate reminder/recall for all patients residing in a specific county and/or zip code, allowing for targeted reminder/recall outreach during geographically specific outbreak events.

Reminder/Recall Date Range *
 From: Through:

Age Range *
 From: Through: UOM: MONTHS ▼

Date of Birth Date Range *
 From: Through:

Options To Target Patients Included For Reminder/Recall

Gender

Ignore Setting For "Do Not Include Patient in Reminder/Recall"?

Only Include Patients With Address (i.e., Street Address, City, State, Zip)?

Increment Patient Reminders/Recall Count?
 Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination

Include Recommender Reminders/Recalls?

Generate Reminder/Recall Event?

Include Patients Due For Vaccinations (Reminders)?

Include Patients Overdue For Vaccinations (Recalls)?
 Minimum Number Of Days Past Due To Include Maximum Number Of Days Past Due To Include

Only include patients with 2 or more non- Influenza/H1N1-09/COVID-19 vaccinations?

Exclude patients with one or more vaccine refusals?

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)

<input type="checkbox"/>	Vaccine Series	Dose Number
<input checked="" type="checkbox"/>	COVID-19	<input type="text"/>

Section 4.2.1.7 Support federal and jurisdictional vaccine program requirements

4.2.1.7.1.

Request:

4.2.1.7.1. The IIS supports management and quality assurance functions for federal and jurisdictional vaccine programs.

4.2.1.7.1.1. The IIS establishes vaccine program procedures in accordance with federal and jurisdictional policies.

4.2.1.7.1.2. The IIS supports the tracking of eligibility at the dose level for publicly purchased vaccines.

4.2.1.7.1.3. The IIS generates a report listing patients that received a non-viable vaccine.

4.2.1.7.1.4. The IIS generates a report listing provider sites that received vaccine lots recalled by the manufacturer.

Response:

WebIZ fully supports management and quality assurance functions required for federal and jurisdictional vaccine programs. The system is designed to align with CDC IIS Functional Standards and provides configurable, standards-based capabilities that enable immunization programs to operationalize policy, monitor compliance, and perform program oversight efficiently. These capabilities support jurisdictional flexibility while maintaining adherence to federal requirements.

Establishment of Vaccine Program Procedures

WebIZ establishes and enforces vaccine program procedures in accordance with federal and jurisdictional policies through configurable business rules, workflows, and data elements. The IIS is designed to support jurisdiction-specific program requirements (e.g., VFC, 317, state-funded programs) without requiring custom code, allowing immunization programs to adapt quickly to evolving federal guidance or local policy changes. Configuration options ensure consistent application of eligibility rules, inventory workflows, and reporting requirements across provider sites while maintaining alignment with CDC IIS Functional Standards.

Tracking Eligibility at the Dose Level for Publicly Purchased Vaccines

WebIZ supports tracking of vaccine eligibility at the dose level for publicly purchased vaccines. Eligibility data is primarily captured through the ingestion of HL7 v2messages, ensuring interoperability with EHRs and other clinical systems, and can also be entered or updated directly through the WebIZ user interface by authorized users. This functionality enables accurate recording of eligibility at the individual dose level and supports downstream reporting, reconciliation, and program oversight activities.

Reporting on Patients Who Received a Non-Viable Vaccine

WebIZ provides an Invalid Dose Report that identifies patients who received non-viable vaccine doses. Doses may be marked invalid either manually by authorized users or automatically by the system's clinical decision support and forecasting logic (CDSi) based on factors such as patient age, minimum or maximum interval violations, or other schedule-based criteria.

Reporting on Provider Sites That Received Recalled Vaccine Lots

WebIZ includes a Vaccine Recall Report that enables immunization programs to identify provider sites and patients associated with vaccine lots that have been recalled by the manufacturer. The report lists patients who received doses from recalled lot numbers at specific provider sites, supporting targeted outreach and compliance activities.

4.2.1.7.2.

Request:

4.2.1.7.2. The IIS supports vaccine inventory management and reconciliation according to federal and jurisdictional vaccine program requirements.

4.2.1.7.2.1. The IIS supports vaccine inventory management, tracking, and reconciliation at the IIS jurisdiction and provider site levels.

4.2.1.7.2.2. The IIS supports creating vaccine orders and monitoring order status.

4.2.1.7.2.3. The IIS supports reporting vaccine returns and wastage.

4.2.1.7.2.4. The IIS automatically administered doses (not historical doses) from active inventory.

Response:

WebIZ provides comprehensive inventory management capabilities that enable jurisdictions and providers to manage, monitor, and reconcile vaccine inventory in accordance with applicable program requirements (e.g., VFC and other jurisdictional programs). The system supports real-time visibility into inventory levels, auditability, and reconciliation workflows.

WebIZ supports vaccine inventory management, tracking, and reconciliation at both the jurisdiction and provider site levels. Users can manage stock, record transfers, perform physical inventory reconciliation, and monitor inventory across sites with role-based access and reporting.

WebIZ supports creation and submission of vaccine orders and provides tools to monitor order status, including review, approval workflows, shipment tracking, and status updates.

WebIZ supports reporting of vaccine returns and wastage, including capture of required details (e.g., reason codes, quantities, lot numbers, expiration dates) to support compliance and reporting requirements.

WebIZ automatically decrements administered doses (excluding historical doses) from active inventory in real time, ensuring accurate inventory balances and reducing manual reconciliation effort.

4.2.1.7.3.

Request:

4.2.1.7.3. The IIS supports data exchange with the national Vaccine Tracking System (VTrckS).

4.2.1.7.3.1. The IIS establishes data exchange with VTrckS in accordance with ExIS (External Information System) specifications

<https://www.cdc.gov/vtrcks/php/about/exis-%20functionality.html#cdc%20generic%20section%201-exis-functionality>

4.2.1.7.3.2. The IIS completes updates to ExIS functionality following publication of specifications.

4.2.1.7.3.3. The IIS establishes automated data exchange with VTrckS.

Response:

WebIZ fully supports bidirectional data exchange with VTrckS and maintains adherence to External Information System (ExIS) specifications and ongoing updates as specifications evolve.

WebIZ establishes and maintains data exchange with VTrckS in accordance with the CDC External Information System (ExIS) specifications. The system implements required message formats, transport protocols, and validation rules to ensure compliant and reliable data exchange.

WebIZ follows a formal change management and release process to review, implement, test, and deploy updates to ExIS functionality following publication of new or revised specifications, ensuring continued compliance without disruption to jurisdiction operations.

WebIZ supports automated, scheduled, and event-driven data exchange with VTrckS, minimizing manual intervention and ensuring timely synchronization of vaccine ordering and inventory data. WebIZ also supports ad hoc data exchange as needed.

Section 4.2.1.8 Support the response efforts for vaccine-preventable disease outbreaks and other public health emergencies

4.2.1.7.3.

Request:

4.2.1.7.3. The IIS supports partner and provider onboarding and vaccine management during vaccine-preventable disease response and/or public health emergencies.

4.2.1.8.1.1. The IIS establishes, coordinates, and executes emergency preparedness plans and procedures in accordance with federal and jurisdictional policies.

4.2.1.8.1.2. The IIS supports expedited communication and onboarding with partners to capture patient demographic and vaccination data in an emergency.

4.2.1.8.1.3. The IIS provides training to onboarded partners.

4.2.1.8.1.4. The IIS supports vaccine administration functionality to include offline documentation of vaccine administration.

4.2.1.8.1.5. The IIS supports integration with tools for vaccination appointment scheduling.

4.2.1.8.1.6. The IIS supports public health immunization reporting to federal and jurisdictional authorities.

Response:

WebIZ supports partner and provider onboarding and vaccine management during vaccine-preventable disease response and/or public health emergencies. There were many lessons-learned during the COVID-19 pandemic, and as a result, Envision has integrated numerous enhancements into WebIZ to better position our clients for handling future vaccine preventable disease response and/or public health emergencies.

WebIZ is a valuable tool that can be used in support of federal and jurisdictional emergency preparedness plans and procedures. The IIS itself does not establish, coordinate, or execute emergency response plans, as that is the responsibility of the Agency. However, the data collected in WebIZ can be easily extracted and utilized for quick decision-making, executing internal response plans, and performing successful public outreach during vaccine preventable disease response and/or public health emergencies. WebIZ also provides IIS staff with the ability to publish statewide announcements and can email and track assigned tasks to any IIS users, regardless of role or Provider/Clinic type.

To facilitate rapid provider onboarding, WebIZ provides a public facing Clinic Registration feature that allows new Providers/Clinics to submit a request for their healthcare organization to begin using the IIS. This fillable form captures all required fields necessary for Provider/Clinic account creation in WebIZ. IIS staff can view new Clinic Registration requests from inside the IIS, and approve or deny them, based on their evaluation. A similar feature and workflow exist for new user account requests.



Envision Technology Immunization Registry

Clinic Registration

Requester Information

Enter your contact information

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Phone Number *	Email Address *
999-999-9999	EMAIL@DOMAIN.COM

Clinic Information

Enter your clinic information.

Are you a member of a larger Provider or Medical Network? *
 Yes No

Clinic Name *	
<input type="text"/>	
Practice Type *	VTrackS PIN
<input type="text"/>	<input type="text"/>
Phone Number *	Fax Number
<input type="text"/>	<input type="text"/>

As part of WebIZ implementation and go-live activities, Envision will provide online training videos that will cover role-based, core IIS functionality, including those critical transactions that need to be performed during a vaccine preventable disease response and/or public health emergency. The training videos will be accessible to authorized WebIZ users and available for self-service download/viewing. If IIS staff need additional training during a public health emergency, Envision will offer virtual sessions on an ad-hoc request basis.

WebIZ includes a Mass Events module that streamlines the collection of patient and vaccination data during a vaccine preventable disease response and/or public health emergency. Additionally, an existing flat file import process can be utilized for uploading patient and vaccination records that are collected offline during a large-scale vaccine preventable disease response and/or public health emergency.

WebIZ can be integrated with tools for vaccination appointment scheduling. Since there are multiple vaccination appointment scheduling tools available and used by IIS programs across the country, Envision would need to know West Virginia’s preferred scheduling tool and be provided with the appropriate specifications to complete integration activities. Envision is happy to collaborate with your IIS staff prior to contract execution to determine the work required to complete this integration and determine if additional costs may be necessary.

Envision can support the Agency’s public health reporting needs to federal and jurisdiction authorities at any point in time during the contract period. Many of our existing WebIZ clients choose to report data to the Centers for Disease Control and Prevention (CDC) using the IZ Gateway; however, Envision can also securely provide your team with extract files, if preferred or required.

Section 4.2.1.9 Participate in and prioritize emerging technologies and standards

4.2.1.9.1.

Request:

- 4.2.1.9.1.** The HS participates in modernization initiatives and emerging technologies.
 - 4.2.1.9.1.1.** The IIS coordinates modernization efforts.
 - 4.2.1.9.1.2.** The IIS plans and executes efforts that align IIS initiatives with modernization priorities.
 - 4.2.1.9.1.3.** The IIS participates in initiatives to develop standards and/or capabilities.

Response:

Envision has a long-standing presence in the IIS industry, playing an active role in public health modernization initiatives and the development of emerging interoperability standards.

Envision has demonstrated leadership in IIS innovation through first-in-class implementations, including the first operational IZ Gateway interfaces, the first fully validated HL7 v2 IIS interface, and the first fully compliant CDSi interface. These efforts established production-ready patterns that have been broadly adopted across the IIS community.

Community Approach:

We coordinate modernization effort following a community software development model. Although the software is proprietary to provide centralized curation and development of software code, ALL work funded by ALL clients becomes part of the shared code base, and licensees of any module receive all updates to that module. In cases where new feature options may not be desired by all clients, there will be switches enabled to enable/disable the functionality or to behave differently in different client environments. The Envision community meets bi-weekly to review updates on product activities, collaborate on key community topics including requirements driven by CDC.

Envision actively participates in national modernization efforts, including multiple HL7 interoperability hack-a-thons focused on emerging capabilities such as CDSi via FHIR operations and HL7 FHIR Bulk Data Export. These activities help ensure continued alignment with evolving public-health data exchange standards.

National Presence: Envision’s Participation in Industry Organizations:

In addition, our team is actively engaged in the public health industry. We contribute and participate in numerous AIRA (American Immunization Registry Association), AIM (Association of Immunization Managers), and CDC-sponsored working groups to address topics such as:

- | | |
|-------------------------------|---|
| IIS VFC Program Collaboration | IIS Reminder/Recall Best Practices |
| IIS Data Quality Assessment | IIS Inventory Management Best Practices |
| CDC IIS Annual Report Updates | IIP Collaborative |
| AIRA Board of Directors | AIRA working groups (SISC, MACAW, etc.) |
| CDSi Working Group | |

Additionally, Envision plays a leadership role in standards coordination, governance, and security. This includes helping establish the IIS-focused HL7 Public Health Workgroup, co-chairing the HL7 Immunization Work Group, and co-chairing the MACAW Group, which validates IIS interoperability conformance. Our staff actively participate in the IIS Security Committee, contributing to updates of the Security Guidance document to align security practices with evolving threats and technologies.

Together, these efforts demonstrate Envision’s commitment to advancing modernization initiatives that align IIS technology with emerging standards, security guidance, and public-health priorities.

Section 4.2.2 Approach & Methodology to West Virginia Specific Goals/Objectives

Envision’s approach to supporting West Virginia’s specific goals and objectives is centered on delivering a practical, scalable, and program-aligned IIS that meets the state’s operational needs while positioning it for long-term success. Building on our existing partnership with West Virginia through disease surveillance, Envision brings a deep understanding of the state’s public health environment, priorities, and data exchange landscape.

Our methodology emphasizes reliability, ease of use, and continuous improvement ensuring that the IIS not only meets current requirements but also evolves alongside program needs. Through a combination of proven implementation practices, configurable platform capabilities, and a collaborative delivery model, Envision enables West Virginia to streamline operations, improve data quality, and enhance coordination across public health systems.

The following sections describe how our approach addresses West Virginia’s specific goals and objectives.

Section 4.2.2.1 System Optimization, Innovation, and Interoperability

4.2.2.1.1.

Request:

4.2.2.1.1.1. The Vendor should describe any processes or practices in place for sharing beneficial system improvements or enhancements, developed through work with one jurisdiction, and later offered to their broader customer base at no additional costs. The response should include:

- 4.2.2.1.1.1.1.** The Vendor should describe how they evaluate and determine whether a customization or optimization may be broadly beneficial.
- 4.2.2.1.1.1.2.** The process and timeline for releasing such enhancements to all customers.
- 4.2.2.1.1.1.3.** Any governance, release management, or communication procedures that ensure jurisdictions are informed of available improvements.
- 4.2.2.1.1.1.4.** Vendors should describe any examples of recent improvements or enhancements provided to customers at no additional cost.

Response:

Envision utilizes a community-driven approach to evaluating new enhancements and features. Enhancement requests funded by an individual jurisdiction are reviewed through an internal governance process to determine feasibility, alignment with the product vision, and potential benefit to the broader customer community.

Once approved, Envision develops an estimate and statement of work (SOW) outlining scope, effort, and any associated costs. Approved enhancement estimates are shared transparently with the entire customer community, enabling other jurisdictions to assess applicability and interest.

Once an enhancement is funded, either through one or more community projects or Envision investment, the community is actively engaged in the requirements-gathering process. This collaborative approach ensures the resulting solution is designed to support multiple jurisdictions and can be broadly adopted, while still meeting the specific needs of the funding jurisdiction.

All enhancements approved and funded by a jurisdiction become part of the standard product code base and are made available to all customers. Depending on the size, complexity, and configuration of the enhancement, additional costs may apply for setup and ongoing support and maintenance for jurisdictions choosing to adopt the feature.

The timeline for releasing enhancements is determined by a combination of the product roadmap and the contractual timelines associated with the funding jurisdiction. Once development begins, the enhancement follows Envision’s standard development and release lifecycle.

New functionality is delivered through Envision’s monthly release cycle. Enhancements are demonstrated during monthly release demonstrations, providing customers with visibility into new features prior to release.

Envision maintains formal governance and release management procedures to ensure all jurisdictions are informed of new features. All enhancement requests undergo review in an internal governance forum, and approved initiatives are communicated to the customer community through shared estimates and ongoing collaboration.

Release management is supported through a consistent monthly release cycle. Each release includes detailed release notes that document new features, enhancements, and improvements. These release notes are published and made available to all customers to ensure transparency and awareness.

Additionally, new features are demonstrated during monthly product demonstrations, providing jurisdictions with a clear understanding of new capabilities and their potential impact. This structured approach ensures jurisdictions are informed, engaged, and able to plan for adoption of enhancements in a timely manner.

A few examples of recent improvements or enhancements provided to customers at no additional cost include:

- Vaccine Ordering Enhancement Project
 - Added running history of edits made a vaccine order, viewable via the vaccine order page
 - Added configurable reminder notifications to users when submitting a vaccine order
 - Project funded by one jurisdiction and available to all at no additional cost
- VTrckS API Phase 1
 - Added support of inbound shipment files from VTrckS, via the VTrckS API
 - Includes automated processes to retrieve files and error processing
 - Project jointly funded by four jurisdictions and available to all at no additional cost to remaining 17
- Public Portal Spanish Localization Reporting Enhancement
 - Updated the Power BI report that tracks utilization of the WebIZ Consumer Portal, to include utilization data for the localized Spanish language option within the Consumer Portal
 - Project funded by one jurisdiction and available to all at no additional cost

4.2.2.1.2.

Request:

4.2.2.1.2. The Vendor should describe their approach and methodology for achieving an error and hold queue for HL7 messages, or for providing an easy way to identify and sort rejected messages.

Response:

WebIZ provides an efficient mechanism to identify, review, and resolve rejected HL7 messages without the use of a traditional hold queue.

All inbound HL7 messages are recorded in a centralized HL7 message log and can be filtered and sorted by processing status, failure type, and custom acknowledgment (ACK) codes. Messages that do not meet CDC or jurisdictional conformance requirements are rejected during processing, and an HL7 ACK is returned to the sender with custom ACK codes and field-level error details to support correction and resubmission.

The IIS supports internal review of HL7 processing and error trends. The WebIZ technical team evaluates message handling as needed and implements updates to ensure continued standards conformance. Submitting partners are notified of any changes that may impact message submission or validation.

A hold queue solution is in our product roadmap and would be available prior to implementation of the new WVSIS.

4.2.2.1.3.

Request:

4.2.2.1.3. The Vendor should describe their approach or methodology for automating updates and synchronization of code sets with CVX, MVX, and NDC tables.

Response:

Envision manages the updates for codes sets with CVX, MVX and NDC tables on behalf of our jurisdictions. When updates are required for these code sets, the changes are included in a scheduled software release for each jurisdiction. MVX and NDC updates can also be made via the user interface at any time by users with the appropriate permissions. Functionality exists where jurisdictions can manage the code sets themselves through user interface updates if they prefer.

4.2.2.1.4.

Request:

4.2.2.1.4. The Vendor should describe their approach or methodology to bulk loading, activating, and deactivating providers, facilities, and users.

Response:

Bulk Loading, Activation, and Deactivation Approach:

WebIZ supports the management of providers, facilities, and users using entity-specific approaches, including file-based bulk user onboarding, workflow-based provider and facility registration, administrative activation and reactivation controls, and bulk deactivation capabilities. These approaches are designed to balance operational efficiency, data integrity, security, and jurisdictional governance, and vary appropriately based on the type of entity being managed.

Bulk Loading

Users:

WebIZ supports the bulk creation of clinic users through the Clinic Staff Import capability. Authorized clinic users may upload a file containing multiple clinic staff records using a defined, pipe-delimited format. Uploaded files are validated for required fields, formatting, and accepted values, with errors and warnings presented prior to submission. Each file must be reviewed and approved by an authorized Program User before processing. Upon approval, the file is processed by a scheduled background job that creates new clinic users in the system. Duplicate records are prevented through identifier matching, and successfully created users are available for ongoing management within WebIZ. This approach enables controlled, auditable bulk onboarding of users while maintaining data quality and security oversight.

Providers and Facilities:

Providers and facilities (clinics) are onboarded through a structured registration and approval workflow. Clinic Administrators submit new clinic registration requests, which are reviewed and approved by jurisdiction IIS staff. Upon approval, WebIZ creates either a new provider and clinic or a new clinic under an existing provider, based on the registration details. Once approved, providers and clinics are active and maintained through the Administration module. Provider and facility onboarding is performed through administrative workflow rather than file-based bulk import, supporting jurisdiction review, policy enforcement, and data completeness.

Activation and Reactivation:

Activation of users, providers, and facilities occurs as part of the applicable onboarding or approval workflow. Users created through the Clinic Staff Import process become active upon approval and successful processing. Providers and facilities become active upon approval of the clinic registration request and are immediately available for authorized use within WebIZ.

WebIZ also supports user reactivation through administrative unsuspension functionality. Users who have been suspended can be reactivated individually or in bulk by authorized administrative staff. Upon reactivation, users are required to reset their passwords before regaining access, reinforcing security controls

and ensuring appropriate reauthorization. Activation and reactivation status is managed through administrative controls and reflected consistently throughout the application.

Deactivation:

WebIZ provides bulk deactivation (suspension) capabilities for clinic users and HL7 facilities through administrative controls. Authorized client administrative staff may suspend multiple users or HL7 facilities at the provider or clinic level. When suspended, users are prevented from accessing WebIZ and HL7 facilities are prevented from submitting messages. Suspension status is visible within user profiles, facility records, and administrative reports, providing transparency and auditability for jurisdiction oversight.

Section 4.2.2.2. Implementation Plan

4.2.2.2.1.

Request:

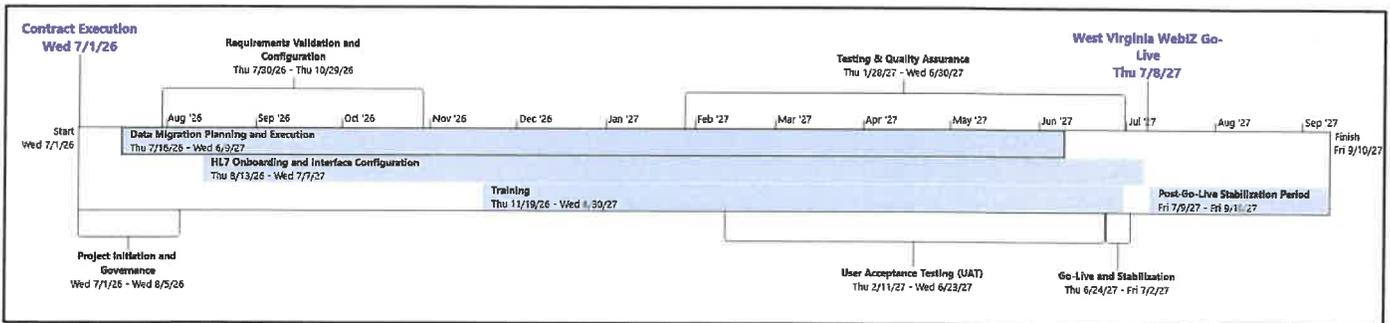
The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

4.2.2.2.1. Overall project management strategy and implementation timeline.

Response:

Envision employs a structured, repeatable implementation methodology designed to ensure a seamless transition from a legacy IIS to our Web IZ platform. Our approach is built on proven delivery practices, early risk mitigation, transparent governance, and disciplined execution.

Below is a visual timeline outlining the 12-month implementation period, based on an assumed contract execution date of July 1, 2026. This timeline can be easily adjusted once the final execution date is established, and it highlights the major phases, milestones, and activities that structure the project from start to finish:



The implementation process is organized into defined phases that balance structure with flexibility, allowing customers to maintain operational continuity while transitioning to a modernized IIS platform.

Phase 1: Project Initiation and Governance Alignment

Upon contract execution, Envision will conduct formal project initiation activities to establish project governance, confirm roles and responsibilities, and finalize project controls. This includes:

- Development of the Project Management Plan
- Establishment of escalation pathways
- Confirmation of communication cadence
- Baseline milestones and deliverables established

Phase 2: Requirements Validation and Configuration

As a mature COTS platform provider, Envision focuses on validating project scope and requirements against WebIZ's configurable capabilities before beginning any additional development. This phase includes:

- Detailed WebIZ demos for jurisdictional workstream leads
- Structured configuration workshops (JAD Sessions)
- Documentation of configuration decisions
- Gather requirements for any additional enhancements outlined in the contract

Phase 3: Data Migration Planning and Execution

Data migration is initiated early and executed iteratively to ensure data integrity and reduce risk. Envision's approach includes:

- Legacy data profiling and schema mapping
- Multiple test migration cycles
- Structured validation sessions with subject matter experts
- Formal sign-off prior to final production cutover
- Final migration using validated scripts and documented procedures

Phase 4: HL7 Onboarding

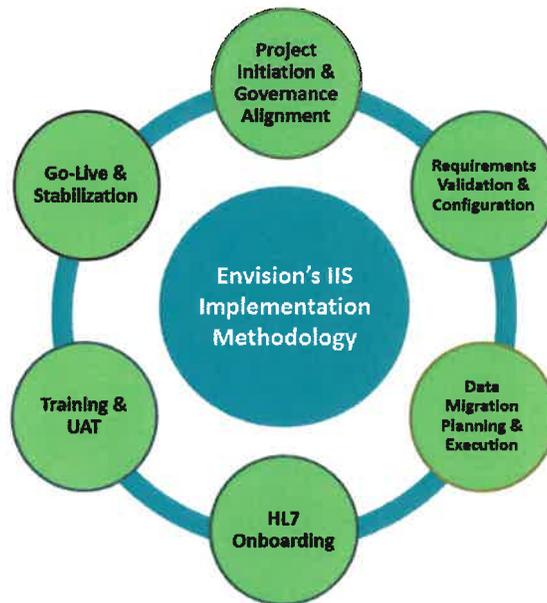
When possible, Envision recommends interfaces and integrations occur through our HL7 interface process. We work with current HL7 onboarding team to re-onboard providers and provide supplemental HL7 SME support to help.

Phase 5: Training and User Acceptance Testing

Training and UAT are structured components of the implementation lifecycle. This phase will have a formally documented plan, with defined project tasks, workstream leads, and clear ownership to ensure alignment and accountability throughout execution.

Phase 6: Go-Live and Stabilization

Go-live is treated as a managed operational event with structured cutover and stabilization support. This phase will have a formally documented plan, with defined project tasks, workstream leads, and clear ownership to ensure alignment and accountability throughout execution. We will provide a two-month stabilization period post implementation to support effective utilization of the new IIS. We typically define this period as 'Hypercare' which includes increased training and support to ensure West Virginia DOH success after go-live with a smooth transition to Maintenance and Operations support.



Project Management Strategy

Envision's project management strategy is grounded in disciplined governance, structured oversight, and proactive risk management led by our Project Management Office. The PMO provides standardized delivery frameworks, quality controls, and executive visibility to ensure the implementation remains aligned with scope, schedule, and budget throughout the implementation

A dedicated Project Manager will serve as the single point of accountability, maintaining the integrated project plan, facilitating weekly status meetings, managing the RAIDD log, and ensuring timely escalation of risks or issues. Formal governance structures, including Steering Committee oversight and defined change control processes, provide transparency and decision authority at appropriate levels.

This approach ensures that progress is measurable, deviations are controlled, and the project team maintains full visibility into performance while ensuring flexibility to address evolving needs without compromising project stability.

4.2.2.2.2.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

- 4.2.2.2.2.** The environment setup, which consists of the following: Production, Test, and Development servers.

Response:

Envision implements a structured, multi-environment architecture to support secure development, controlled testing, and stable production operations. This strategy is designed to enforce separation of duties, protect production data, and ensure reliable promotion of application and infrastructure changes.

Environment Architecture Overview:

The IIS is deployed within Microsoft Azure Government using Infrastructure-as-a-Service (IaaS) virtual machines running Windows Server at both the application and database tiers. The model consists of the following environments:

- Production Environment
- Non-Production (Test) Environments
- Development Environment

Each environment is logically and operationally segregated to ensure security, stability, and compliance.

Production Environment:

The Production environment supports live IIS operations and jurisdictional users. Key characteristics include:

- Deployed within Azure Government in dedicated resource groups and subnets.
- Web/application tier consisting of redundant virtual machines balanced by a workload-prioritized load balancer.
- SQL Server deployed in an Always On Availability Group configuration across two servers.
- 3x locally redundant data storage.
- Dedicated Barracuda Web Application Firewall (WAF) instance.
- Separate SQL Server Availability Group for Production data.
- Multi-factor authentication (MFA) required for infrastructure access.
- Production server access restricted to Operations personnel only.

This environment is optimized for high availability, security, and performance, and is monitored continuously through Azure Monitor and Site24x7.

Non-Production (Test) Environments:

The Non-Production environments are used for client validation, user acceptance testing, configuration review, and release verification prior to Production deployment. Key characteristics include:

- Deployed within the same Azure Government subscription as Production but segregated via separate resource groups and subnets.
- Hosted on a separate SQL Server instance from Production.
- Single-instance web and SQL servers (no Availability Group) to optimize cost while supporting full application functionality.
- Dedicated Barracuda WAF instance separate from Production.
- No Production data is stored in this environment.
- Client and authorized company personnel may access these environments for testing and validation.

These environments support release validation while ensuring complete isolation from Production systems.

Development Environments:

The Development environments support application development, feature enhancement, and early-stage testing. Key characteristics include:

- Hosted in a separate Azure subscription by Envision to provide full isolation from Production and Non-Production systems.
- Architecture mirrors Production to ensure architectural consistency during development.
- Contains only synthetic or test data.
- No Protected Health Information (PHI) or Production data is permitted in this environment.
- Access restricted to authorized development personnel.

This isolation model ensures compliance with data protection requirements and reduces risk during development activities.

Deployment and Promotion Methodology:

The Vendor utilizes Azure DevOps pipelines and Infrastructure-as-Code (Bicep) templates to manage deployments across all environments.

The release promotion model follows a controlled progression:

Development → Non-Production → Production:

Key controls include:

- Version-controlled database schema and application artifacts.
- Automated build and deployment pipelines.
- Version-controlled infrastructure definitions where applicable.
- Validation and testing in Non-Production prior to Production release.
- Manual approval gates required for Production deployment.

This structured approach ensures repeatability, traceability, and change control across environments.

Data Governance and PHI Controls:

Strict data governance controls are enforced across environments:

- Production data is restricted to the Production environment.
- Non-Production environments do not contain Production data.
- Development environments contain synthetic data only.
- PHI is prohibited in Development environments.
- Role-based access controls limit user access based on environment and job function.

This separation protects sensitive immunization data while supporting secure development and testing.

Monitoring and Logging:

Monitoring is centralized across environments using Azure Monitor and Site24x7 to provide operational visibility and proactive alerting.

Logging data is segmented by environment to ensure clarity, auditability, and appropriate incident response workflows.

Analytics Environments:

Separate Microsoft Fabric workspaces are maintained for Development, Non-Production, and Production environments. This ensures analytical workloads remain environment-specific and aligned with corresponding data governance controls.

4.2.2.2.3.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

4.2.2.2.3. System configuration and workflow customization.

Response:

Envision employs a structured, collaborative approach to system configuration and workflow customization to ensure the implemented IIS aligns with the jurisdiction’s operational needs and business processes.

Immediately following project kickoff, Envision will initiate a series of configuration workshops. These sessions are conducted using a live instance of the application and are designed to review available configuration options while engaging jurisdiction stakeholders in detailed discussions of current and desired workflows.

During these sessions, Envision will:

- Review standard system functionality and available configuration options
- Analyze jurisdiction-specific workflows and business rules
- Provide expert recommendations to optimize system configuration
- Confirm configuration decisions through collaborative review and stakeholder consensus.

All selected configuration options and related workflow decisions are formally documented in a Configuration Document. Once configuration decisions are finalized and documented, Envision will apply the approved configurations to establish the initial system build. This configured environment serves as the foundation for training, user acceptance testing (UAT), and operational validation.

4.2.2.2.4.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

- 4.2.2.2.4. Data migration strategy, including:
 - 4.2.2.2.4.1. Existing IIS data migration.
 - 4.2.2.2.4.2. User and roles migration.
 - 4.2.2.2.4.3 Provider, Facility, and Organization migration.
 - 4.2.2.2.4.4. Program enrollment migration.
 - 4.2.2.2.4.5. Existing Interface migration and testing.

Response:

Envision employs a proven and collaborative data migration methodology to ensure the accurate, secure, and complete migration of existing IIS data into the WebIZ database. Successful data migration is driven by early planning, close coordination with jurisdictional data resources, iterative validation, and comprehensive documentation. Envision will initiate data migration planning activities early in the project lifecycle to allow sufficient time for multiple test migrations of provider, user, patient, and immunization data. Beginning migration activities early enables both teams to identify and resolve legacy data quality issues, validate data mappings and transformation logic, and confirm that migrated data meets jurisdictional expectations well in advance of go-live. The data migration process includes the following key steps:

- **Data Extraction:**
 - Legacy IIS data is exported by the jurisdiction into a SQL Server-compatible format to support secure and efficient transfer of the raw data.
- **Migration Framework Preparation:**
 - Envision provides the required database schemas, data structures, and SQL scripts to establish standardized data containers for migration activities.
- **Data Population:**
 - Jurisdictional resources populate the migration containers with legacy IIS data, with guidance and support from Envision to ensure consistency and accuracy.
- **Secure Data Transfer:**
 - Populated data is securely transmitted to Envision using SQL Server backup files (.bak).
- **Data Restoration:**
 - Envision restores legacy data into a secure SQL Server database environment dedicated to migration processing.
- **Data Mapping, Cleansing, and Transformation:**
 - Envision executes automated migration scripts and transformation processes to map legacy data elements to the target data model. This includes data cleansing and normalization activities, such as address validation and standardization using the Smarty API, to improve data quality and consistency.
- **Documentation and Governance:**

- All data mappings, transformation rules, and data decisions are fully documented in a comprehensive Data Migration Plan to support transparency, auditability, and long-term system governance.
- Iterative Validation:
 - Multiple migration cycles are conducted throughout the project to allow for validation, reconciliation, and refinement of migration logic based on jurisdictional review and feedback.
- Final Production Migration:
 - The final migration is executed at go-live, leveraging validated migration scripts and processes to minimize risk and ensure a seamless transition to the new IIS.

This structured, iterative approach significantly reduces data migration risk, supports data integrity, and ensures that the jurisdiction’s historical IIS data is fully available, accurate, and ready for operational use at system go-live.

Envision utilizes a structured approach to migrating users and roles to ensure continuity of access, appropriate permissions, and operational readiness at go-live. As an initial step, Envision will work collaboratively with the jurisdiction to define a standardized set of security roles within WebIZ. These roles are designed to group users by functional responsibilities and define the permissions required to perform job-specific tasks within the system. This role-based approach supports security best practices and simplifies long-term user management.

Once security roles are defined and approved, each user included in the migration will be assigned to the appropriate role based on their responsibilities within the legacy IIS. Each defined role is validated throughout the project lifecycle. During system testing and user acceptance testing (UAT), Envision and jurisdiction stakeholders will verify that users assigned to each role have the necessary permissions to complete required workflows while ensuring access is appropriately restricted. This testing ensures that users can perform their duties effectively on day one without requiring post-go-live security adjustments.

Envision applies a collaborative and data-driven approach to the migration of provider, facility, and organization data to preserve relationships and ensure data integrity within the new IIS. The migration process begins with a detailed review of how providers, facilities, and organizations are structured and related within the legacy IIS. Through dedicated data migration meetings and close collaboration with jurisdiction subject matter experts, Envision defines a clear mapping from legacy entities to the corresponding entities within the new IIS data model.

Throughout the project, Envision continuously reviews entity relationships to ensure accuracy and completeness. Automated validation scripts are executed to identify relationship issues, including missing links or orphaned records. These scripts, which Envision has successfully utilized on prior IIS implementations, are highly effective in detecting data anomalies early and supporting corrective actions before go-live. This iterative review and validation process ensures that provider, facility, and organization hierarchies are accurately represented in the new IIS and function as expected across system workflows.

Envision uses a proven and repeatable process to migrate program enrollment data, ensuring that critical enrollment, shipping, and contact information is accurately captured in WebIZ. For clinics enrolled in the VTrckS vaccine programs, Envision leverages data from a VTrckS extract to populate program enrollment information within the new IIS. The VTrckS PIN is used to identify enrolled clinics within the legacy IIS data and associate them with the corresponding records in the VTrckS extract. This approach ensures that essential program enrollment details—including shipping addresses and key contact information—are accurately populated and aligned with authoritative VTrckS data. By relying on VTrckS as the source for enrollment information, Envision reduces data discrepancies and supports continuity of vaccine ordering and

distribution processes following go-live. This methodology has been successfully applied on previous IIS projects and provides a reliable mechanism for program enrollment migration.

Envision supports the migration and validation of existing interfaces to ensure continuity of data exchange and interoperability with external systems. As part of the migration effort, Envision will review existing interfaces within the legacy IIS, including their purpose, data flows, and dependencies. Interfaces are mapped to corresponding integration points in the new IIS, and configuration or transformation updates are identified as needed. Following migration, interfaces are tested to verify that inbound and outbound data exchanges function as expected. Testing includes validation of message structure, data completeness, and processing results within the IIS. Any issues identified during testing are addressed prior to go-live to minimize operational disruption. This structured migration and testing approach ensures that existing interfaces continue to operate reliably in the new WebIZ environment and support ongoing interoperability requirements.

4.2.2.2.5.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

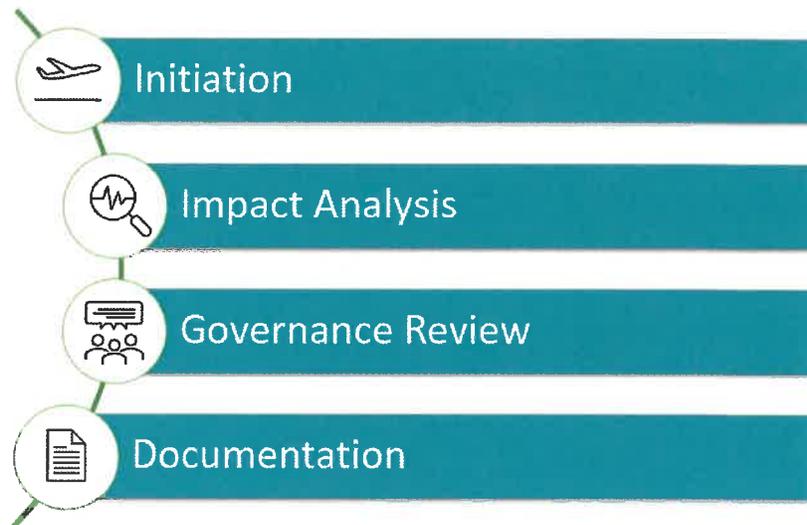
4.2.2.2.5. Change request management process.

Response:

Envision employs a structured Change Request Management process to maintain scope control while allowing necessary flexibility. While Envision maintains a mature internal Change Request Management framework and supporting documentation, we will also fully align with and follow all jurisdiction-specific processes, reviews, and approval protocols. Our team will collaborate closely with the jurisdiction to ensure that both Envision’s structured approach and the jurisdiction’s governance requirements are seamlessly integrated into the change management workflow.

Changes follow a defined lifecycle:

1. Initiation – Formal documentation and business justification.
2. Impact Analysis – Scope, schedule, budget, and risk assessment.
3. Governance Review – Approval, rejection, modification, or deferral.
4. Documentation – Logging in the Change Control Register and updates to the Project Plan.



4.2.2.2.6.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

4.2.2.2.6. Roles and responsibilities of vendor and client teams.

Response:

Successful implementation requires clearly defined roles, shared accountability, and structured collaboration between Envision and the jurisdiction. The roles below represent the proposed team structure for Envision and the jurisdiction and will be finalized collaboratively during project initiation.

Envision Implementation Team Roles:

- **Executive Sponsor** – Provides strategic oversight, executive alignment, and escalation support.
- **Project Director** – Ensures delivery alignment with contractual objectives and organizational priorities.
- **Project Manager** – Leads day-to-day project execution, manages schedule and dependencies, oversees risk tracking, coordinates workstreams, and provides status reporting.
- **Technical Lead** – Oversees system architecture, configuration, environment readiness, and technical solution alignment.
- **Data Migration Lead** – Manages data profiling, mapping, validation cycles, and migration execution.
- **Interoperability Lead** – Directs interface development, external partner coordination, and connectivity testing.
- **Training and Change Management Leads** – Support user readiness, stakeholder engagement, and operational transition planning.

Jurisdiction Team Roles:

- **Executive Sponsor** – Provides strategic direction, resolves policy-level decisions, and ensures organizational alignment.
- **Jurisdiction Project Manager** – Serves as primary coordination point, facilitates internal stakeholder engagement, manages decision timelines, and reviews deliverables.

- **Program and Clinical Subject Matter Experts** – Validate requirements, participate in testing, and ensure operational alignment.
- **IT and Infrastructure Representatives** – Support environment coordination, security review, integration testing, and technical approvals.
- **Data and Reporting SMEs** – Validate data migration outputs and reporting accuracy.

4.2.2.2.7.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

4.2.2.2.7. Risk mitigation strategies and contingency planning.

Response:

Envision integrates risk mitigation and contingency planning directly into its project management framework to ensure implementation stability, schedule adherence, and operational continuity.

The combination of our proven project approach and team expertise provides West Virginia with a leading low risk option. However, no project is without risk, and we recognize the importance of effective risk management. Risk management begins at project initiation and continues throughout the project lifecycle. Risks are identified collaboratively with jurisdictional stakeholders, assessed for probability and impact, and tracked within a structured RAIDD log (Risks, Actions, Issues, Decisions, Dependencies). High-impact risks are reviewed regularly through our project governance structure to ensure transparency and timely resolution.

Key risk domains include data migration, integrations, schedule dependencies, and go-live readiness. These are mitigated through iterative validation cycles, early interface definition and testing, critical path monitoring, and structured cutover planning.

Our approach centers on open-honest communication and a collaborative approach between Envision and the Agency to mitigate project risks that arise. The following diagram outlines our general approach to risk management during IIS implementations.



Our Project Manager will maintain a RAIDD log throughout the implementation phase of the project. The initial version will be developed during project launch and collaboratively maintained throughout the project. This will be actively reviewed with West Virginia DOH regularly and will be available in our project repository. We also intend to have monthly executive level leadership meetings with West Virginia DOH to give open visibility to project risks and potential impacts. Our goal is to eliminate surprises during the implementation of the new WebIZ IIS.

Contingency planning focuses on early identification, clear ownership, and decisive escalation. This proactive approach enables Envision to address potential challenges before they affect implementation outcomes and ensures a controlled, predictable transition to the new IIS platform.

4.2.2.2.8.

Request:

The Vendor should provide a comprehensive description of their approach and methodology for implementing the proposed IIS and migrating existing data. The response should include, but is not limited to, detailed information on the following:

4.2.2.2.8. Training, support, and knowledge transfer during implementation.

Response:

Envision fully understands how important training, support, and knowledge transfer is during IIS implementation. Our team is committed to turning Agency staff into WebIZ super users. Throughout the implementation phase of the project, Envision will provide virtual WebIZ training. These sessions will occur early and often. Virtual training will be re-enforced with in-person training sessions during on-site visits to the Agency. On-site visits occur multiple times throughout the implementation period. Since IIS training is not a one-size fits-all process, WebIZ documentation and videos will also be supplied to Agency staff. Rest assured, our training, support, and knowledge transfer in preparation for go-live is thorough.

However, our training, support, and knowledge transfer do not stop at go-live. The Agency can expect to see multiple Envision staff working alongside your team during the first week of WebIZ usage statewide. This will be a hectic time, and we feel that it is critically important for your team to have this extra layer of technical support. Our team will assist the Agency with responding to Help Desk inquiries, and can provide additional staff training, if necessary.

Post go-live, and at any point in time during the maintenance and support phase of the contract, Agency staff can request ad hoc training from Envision. Staff turnover, new features and enhancements, etc. are all reasons why we consider training, support, and knowledge transfer an on-going contract deliverable. Simply put, we are here to help the Agency succeed.

In addition, the specific training tasks, sequencing, and estimated durations are detailed in Envision’s proposed project schedule, providing the Agency with a clear view of how training activities align with the overall implementation timeline.

Section 4.2.2.3 Vaccine Exemption Functionality

4.2.2.3.1

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include, but is not limited to the following:

4.2.2.3.1 Ability to record exemptions by vaccine or disease category.

Response:

WebIZ supports the ability to record exemptions by vaccine group. On the New Exemption page, Agency staff can select the applicable vaccine group(s) assigned to the selected patient’s exemption.

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 18Y 11M 1D | GENDER: M

New Exemption

Exemption Reason *
 MEDICAL EXEMPTION

Begin Date * 03/02/2026 **End Date** MM/DD/YYYY

Allergy / Risks *
 SEVERE ALLERGIC REACTION AFTER PREVIOUS DOSE OF INFLUENZA

Individual Vaccines School Required Vaccines

Vaccine Groups Available Items
 EBOLA
 H1N1-09
 HEP A
 HEP B
 HIB
 HPV
 JAPANESE ENCEPHALITIS
 MENINGOCOCCAL
 MENINGOCOCCAL B
 MMR
 ORTHOPOXVIRUS

Selected Items *
 INFLUENZA

Note: Hold the Ctrl key to select or deselect multiple items

Note: If applicable, more than one (1) vaccine group can be selected for one (1) exemption entry.

Once added, the Exemption is stored on the patient’s demographic record. If a medical exemption is recorded, an Allergy/Risks ARE Specified link is also added to the top of the page. Clicking this link will take the user to the Exemptions page which displays all exemption-related data.

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 18Y 11M 1D | GENDER: M [Allergy / Risks ARE specified](#)

Exemptions

Vaccine Group	Exemption Reason	Allergy / Risks	Begin Date	End Date	Status	Adult	Action
Influenza	Medical Exemption	Severe allergic reaction after previous dose of Influenza	03/02/2026		ACTIVE	?	VIEW

Showing 1 to 1 of 1 entries

Additionally, when a medical exemption is added to WebIZ, it suppresses the “recommended immunizations” list for the patient on the Immunizations Home page:

Before the Medical Exemption was added – Recommended Immunizations:

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 18 Years 11 Months 1 Day | GENDER: MALE

Immunizations Home

Recommended Immunizations for today, 03/02/2026 (18 Years 11 Months 1 Day)

Vaccines	
MMR	Hep B, ped/adol
Varicella	Hep A, ped/adol, 2D
Influenza, P-Free	Meningococcal B OMV
HPV9	Tdap, Adсорbed
MCV4Q/MCV4P (Menveo)	COVID-19 (PFR) 12+yrs

Please do not rely solely on the Recommender to forecast immunizations.

Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <https://www.cdc.gov/pinkbook/hcp/table-of-contents/index.html>

View Recommender Details

Auto-Populate Add Vaccines Screen

After the Medical Exemption was added – Recommended Immunizations:

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 18 Years 11 Months 1 Day | GENDER: MALE

Immunizations Home

Recommended Immunizations for today, 03/02/2026 (18 Years 11 Months 1 Day)

Vaccines	
MMR	Hep B, ped/adol
Varicella	Hep A, ped/adol, 2D
Meningococcal B OMV	HPV9
Tdap, Adсорbed	MCV4Q/MCV4P (Menveo)
COVID-19 (PFR) 12+yrs	

Please do not rely solely on the Recommender to forecast immunizations.

Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <https://www.cdc.gov/pinkbook/hcp/table-of-contents/index.html>

View Recommender Details

Auto-Populate Add Vaccines Screen

Allergy / Risks ARE specified

4.2.2.3.2.

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include, but is not limited to the following:

- 4.2.2.3.2. Support for exemption types: permanent, temporary (with expiration date), and provisional (with review date).

Response:

WebIZ currently supports the collection of permanent and temporary (with expiration date) exemptions. Agency users can enter an Exemption “Begin Date” **only** to create a permanent exemption, or they can enter both a “Begin Date” and “End Date” to capture a temporary exemption. If a temporary exemption is added, it will only be applied to that patient’s record in WebIZ during that defined period.

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 18Y 11M 10D | GENDER: M | Allergy / Risks ARE specified

New Exemption

Individual Vaccines
 School Required Vaccines

Vaccine Groups

Available Items

- ANTHRAX
- CHIKUNGUNYA
- CHOLERA
- COVID-19
- DENGUE
- DTAP / TD / TDAP
- EBOLA
- H1N1-09
- HEP A
- HEP B
- HIB

Selected Items *

Note: Hold the Ctrl key to select or deselect multiple items.

Buttons: Cancel, Admin Tools, Create, Save

Note: Envision plans to add the ability to add provisional exemptions (with a review date) in WebIZ prior to the Agency’s go-live date. Our team considers this a minor enhancement.

4.2.2.3.3.

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include, but is not limited to the following:

4.2.2.3.3. Support for exemption reasons: medical, religious, philosophical.

Response:

Exemption types, including medical, religious, and philosophical, are all supported in WebIZ. Since acceptable “Exemption” types vary from one (1) WebIZ client to another, our configuration tools have built-in flexibility, allowing each client to define their own exemption types via self-service code table in the user interface. Agency staff can enter a description (medical, religious, philosophical), status, and set a variety of exemption-related flags that interact with multiple WebIZ pages.

Code Tables

Buttons: Cancel, Update

Edit Vaccination Refusal Reason Codes

Id	Description	Status Code	Order	Add Generic Note Flag	Require Additional Note	Comments Flag	Add Generic Allergy Risk Flag	Require Allergy Risk Flag	Note Type	Unprintable Flag
1	Religious Exemption	Active	999	Yes	No		No	No	No	
8	Patient Decision	Active	999	Yes	No		No	No	No	
9	Parental Decision	Active	999	Yes	No		No	Yes	No	
10	Medical Exemption	Active	999	Yes	No		No	Yes	No	

Add Vaccination Refusal Reason Codes

Id	Description	Status Code	Order	Add Generic Note Flag	Require Additional Note	Comments Flag	Add Generic Allergy Risk Flag	Require Allergy Risk Flag	Note Type	Unprintable Flag
		Active								

Once the code table values have been established by the Agency, the descriptions populate the available options for selection in the Exemption Reason dropdown field.

Note: Envision will work with the Agency to define the code table values during the implementation phase of the project.

4.2.2.3.4.

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include, but is not limited to the following:

- 4.2.2.3.4. Linkage of exemption records to patient demographics (e.g., age, race/ethnicity, geography).

Response:

WebIZ links exemption records to patient demographics, including age, race/ethnicity, and geography. The Patient Demographics page provides the selected patient’s age, collects their Ethnicity/Race data, and captures both mailing and physical address information. Users can select Exemptions for the main menu panel to view all exemptions record for the selected patient. When a medical exemption is recorded for the patient, a link to that exemption is provided at the top of the Patient Demographics page. Clicking on the link will provide all relevant exemption details to the user.

4.2.2.3.5.

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include but is not limited to the following:

4.2.2.3.5. Reporting capabilities by school, grade, district, exemption type, and compliance status.

Response:

WebIZ supports the association of patient exemption records with school enrollments, enabling robust exemption reporting at the school district, school, and grade levels. Exemption data is tied to enrollment dates and exemption effective dates, allowing users to evaluate exemption status over time.

Reporting outputs include key data elements necessary to analyze patient-level exemption status for a selected district or school, including exemption type and exemption status. Exemption data is also available via a statistical summary to provide the percentage of students with exemptions by type and vaccine group. Reports are available in Excel and CSV formats, providing users with flexible filtering, sorting, and analysis capabilities to meet local and state reporting needs.

4.2.2.3.6.

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include, but is not limited to the following:

4.2.2.3.6. Integration with school roster functionality and support for longitudinal tracking.

Response:

As previously stated, WebIZ supports the association of patient exemption records with school enrollments, enabling robust exemption reporting at the school district, school, and grade levels. Exemption data is tied to enrollment dates and exemption effective dates, allowing users to evaluate exemption status over time.

Reporting outputs include key data elements necessary to analyze patient-level exemption status for a selected district or school, including exemption type and exemption status. Exemption data is also available via a statistical summary to provide the percentage of students with exemptions by type and vaccine group. Reports are available in Excel and CSV formats, providing users with flexible filtering, sorting, and analysis capabilities to meet local and state reporting needs.

To support longitudinal tracking of exemption data using school rosters, WebIZ offers a ‘Student Grade Advancement’ feature that allows school nurse users to take students associated with a grade level in WebIZ and move them forward at the completion of each school year. This supports longitudinal tracking of exemption data from the time the student enters kindergarten, until the time they graduate high school, offering a unique opportunity to evaluate the same students over an extended period.

4.2.2.3.7.

Request:

The Vendor should provide a detailed description of their approach, system capabilities, and configuration options related to vaccine exemptions. The response should include, but is not limited to the following:

4.2.2.3.7. Configuration options for jurisdiction-specific exemption workflows and review processes.

Response:

WebIZ provides the Agency with the ability to establish medical, philosophical, and religious exemptions. This configuration is done in code tables in the user interface. Since it is common for medical, philosophical, and religious exemptions to be applied to all school required vaccines for a specific patient/student, Envision has

established a workflow that streamlines the creation of exemptions in WebIZ. Clients can determine which vaccine groups are required for school entry within an existing code table. Those marked “Yes” under the School Vaccine Exemption column create a school required vaccine group.

Edit Vaccine Group Codes

Update Cancel

Id	Vaccine Group Code	Description	Order	Status Code	Serialize In Group Ind	Include For Reminders By Default Flag	Duplication Days	Exclude?	Group Only Contains Live Vaccine Flag	H7 Do Not Take Patient Ownership Flag	Administer Full Vaccine Group Flag	Prebook Eligible Flag	School Vaccine Exemption
1	DTaP / TD / Tdap	DTP, DT, DTaP, T, Td, Tdap	10	Active	Y	Yes	10	No	No	No	NO	YES	YES
2	Hep A	HEPA (ped and adult), TWINRX	60	Active	Y	Yes	10	No	No	NO		YES	YES
3	Hep B	HEPB, HB-HEP	70	Active	Y	Yes	10	No	No	NO		YES	YES
4	Hib	Hib, H-DTaP	30	Active	Y	Yes	10	No	No	NO		YES	YES
5	MMR	MMR, MR, Mumps, Measles, Rubella	80	Active	Y	Yes	10	No	Yes	NO	YES	YES	YES
6	Pneumococcal	Pneumococcal (PCV, PCV7, PCV13)	40	Active	Y	Yes	10	No	No	NO		YES	YES
7	Polio	IPV, OPV	20	Active	Y	Yes	10	No	No	NO		YES	YES
8	Rotavirus	Rotavirus	50	Active	Y	Yes	10	No	Yes	NO			
9	Varicella (CPOX)	Varicella	80	Active	Y	Yes	10	No	Yes	NO		YES	YES
10	Other	Others not on Schedule	160	Active	N	No		No	No	YES			
11	Travel	Travel	150	Active	N	No		No	No	YES			
12	Influenza	Influenzas	120	Active	Y	Yes	10	Yes	No	YES		YES	
13	TB	TB (PPD TST)	250	Active	Y	No		No	No	NO			
14	Meningococcal	Meningococcal	100	Active	Y	Yes	10	No	No	NO		YES	YES
15	HPV	Human Papilloma Virus	110	Active	Y	Yes	10	No	No	NO			
16	Rabies	Rabies	130	Active	Y	No		No	No	NO			
17	H1N1-09	Novel Influenza H1N1 2009	121	Active	Y	No	10	Yes	No	NO			
18	Zoster	Zoster	200	Active	Y	Yes	10	No	Yes	NO			
20	Japanese Encephalitis	Japanese Encephalitis	161	Active	Y	No		No	No	NO			

If an exemption is submitted for a patient that is applicable to all school-required vaccines, Agency staff can select the “School Required Vaccines” option on the New Exemption page. This selection will automatically insert the designated school required vaccines group under the Selected Items field.

EXAMPLE PATIENT ID: 1067779 | DOB: 04/01/2007 | AGE: 16Y 11M 3D | GENDER: M

New Exemption

Exemption Reason: RELIGIOUS EXEMPTION | Begin Date: 06/01/2025 | End Date: 06/30/2026

Individual Vaccines School Required Vaccines

Vaccine Groups

Available Items: ANTHRAX, CHIKUNGUNYA, CHOLERA, COVID-19, DENGUE, EBOLA, H1N1-09, HPV, INFLUENZA, JAPANESE ENCEPHALITIS, MENINGOCOCCAL B

Selected Items: DTaP; TD / TDAP, HEP A, HEP B, HIB, MENINGOCOCCAL, MMR, PNEUMOCOCCAL, POLIO, VARICELLA (CPOX)

Note: Hold the Ctrl key to select or deselect multiple items

Once the Create button is selected, an exemption entry is inserted into the patient’s record for each of the designated school required vaccines.

EXAMPLE PATIENT ID: 1067778 | DOB: 04/01/2007 | AGE: 18Y 11M 3D | GENDER: M

Exemptions 1 Add Exemption Admin Tools

Vaccine Group	Exemption Reason	Allergy / Risks	Begin Date	End Date	Status	Acclt	Action
DTaP / TD / Tdap	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Hep A	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Hep B	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Hib	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Meningococcal	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
M/MR	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Pneumococcal	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Polio	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW
Varicella (CPOX)	Religious Exemption		06/01/2025	06/30/2026	ACTIVE	2	VIEW

Showing 1 to 9 of 9 entries Previous 1 Next

As exemptions continue to increase nationwide, Envision is planning to automate the current manual exemption workflow. This means that residents will be able to submit electronic exemption forms to the Agency for review and approval inside the IIS. This exciting new feature will be the expansion of our current Change Request application. WebIZ clients will be able to configure the application to meet state-specific exemption requirements. Residents will complete the required fields and/or attach required documentation, and those submissions will be processed into WebIZ for the Agency’s review and approval. Once approved, exemptions will be added to the patient’s demographic record, and in turn be applicable to school rosters in WebIZ.

Section 4.2.2.4 Coverage Reporting and Population Definition

4.2.2.4.1.

Request:

The Vendor should provide a comprehensive description of their approach to coverage reporting and how the system supports jurisdiction-specific reporting needs. The response should include, but is not limited to, detailed information on the following:

- 4.2.2.4.1. Ability to define and document the demographic population used for rate calculations (numerator and denominator).

Support for jurisdictional filtering by state, county, or other geographic boundaries.

Response:

WebIZ provides the ability to define and document the demographic population used for rate calculations (numerator), and supports jurisdictional filtering by geographic boundaries (state, county, and other jurisdiction-defined areas).

Population Definition for Numerator and Denominator:

The system supports defining numerator populations through configurable parameters that can be saved as documented report definitions. Key features include:

- Denominator (Population at Risk)
 - Define population cohorts using demographic and residency criteria such as:
 - age/Date of Birth ranges (e.g., 19–35 months)
 - residency status (county or zip code)
 - active status criteria (e.g., active, inactive)

- organization/site attribution when appropriate (e.g., attribution by provider, school, clinic)
 - Configurable “as of” date logic to support point-in-time reporting.
- Numerator (Immunized/Series Status)
 - Numerator inclusion is calculated based on immunization events that meet the defined series or dose criteria (e.g., complete series by age milestone).
 - Supports inclusion logic such as:
 - valid dose rules (e.g., minimum intervals, minimum ages, dose validity)
 - recognized vaccine code sets and mappings (e.g., CVX-based groupings)
 - handling of historical vaccinations according to jurisdiction policy (e.g., accepted vs. excluded historical records)

Documentation & Auditability:

The system supports documentation of:

- Inclusion/exclusion criteria
 - cohort definitions
- Vaccine/series definitions used
 - run parameters (date range, geography, age band, etc.)
- Outputs can include metadata or a “report definition summary” to promote transparency and reproducibility.

Geographic Filtering:

Coverage calculations can be filtered by geographic boundaries based on jurisdiction-defined rules, including:

- State/jurisdiction
- County
- ZIP (as configured)

4.2.2.4.2.

Request:

The Vendor should provide a comprehensive description of their approach to coverage reporting and how the system supports jurisdiction-specific reporting needs. The response should include, but is not limited to, detailed information on the following:

4.2.2.4.2. Support for jurisdictional filtering by state, county, or other geographic boundaries.

Response:

WebIZ supports jurisdictional filtering by county or zip code to enable coverage reporting aligned to local program and analysis needs.

Geographic Attribution Options:

The system supports geographic filtering using patient demographic data such as:

- current address
- address at a specified point in time (“as of” reporting date)
- alternate residence definitions (e.g., county of residence or zip code of residence)

4.2.2.4.3.

Request:

The Vendor should provide a comprehensive description of their approach to coverage reporting and how the system supports jurisdiction-specific reporting needs. The response should include, but is not limited to, detailed information on the following:

- 4.2.2.4.3.** Ability to generate reports reflecting:
 - 4.2.2.4.3.1.** Complete vaccine series.
 - 4.2.2.4.3.2.** Initiation of series (1 or more doses).
 - 4.2.2.4.3.3.** Final dose needed to complete a series.

Response:

WebIZ supports coverage reporting that reflects complete vaccine series, initiation (≥ 1 dose), and identification of the final dose needed to complete a series.

WebIZ generates coverage reports for series completion, including:

- Standard series definitions
- Completion by age milestone or by reporting period
- Cohort-based completion rates (e.g., children by 24 months, adolescents by 13 years)

WebIZ supports reports that calculate initiation rates for selected vaccines/series, including:

- Receipt of at least one dose during the defined time period or before the milestone

WebIZ supports identification of individuals who are not up to date and require the final dose to complete a series, including:

- Reports that list individuals missing a final dose based on the series definition
- Cohort filtering to support outreach (e.g., age band, provider site attribution)
- Optional grouping by missing dose type (e.g., "needs one dose")

4.2.2.4.4.

Request:

The Vendor should provide a comprehensive description of their approach to coverage reporting and how the system supports jurisdiction-specific reporting needs. The response should include, but is not limited to, detailed information on the following:

- 4.2.2.4.4.** Configuration options for customizing report parameters and aligning with CDC and state-defined coverage metrics.

Response:

WebIZ provides configuration options to customize report parameters and align with CDC and state-defined coverage metrics.

Configurable Coverage Metric Parameters:

WebIZ supports configuration of coverage reporting to align with jurisdiction-defined measures, including:

- Series definitions and vaccine groupings
- Inclusion/exclusion criteria (e.g., residence rules, active patient logic, opt-out handling per policy)
- Cohort definitions (age ranges, milestone dates, evaluation windows)

Reusability and Governance:

- Report templates can be saved and reused across reporting cycles to ensure consistent metric production.
- Jurisdiction administrators can manage which configurations are available to which user roles.
- Changes to metric definitions can be documented and controlled to maintain continuity and comparability over time.

- As CDC metrics change, our product and community model evolves with those changes to set clients up for long term success.

Outputs for Public Health Analysis:

Coverage reports can be delivered as:

- Aggregated rates (numerator/denominator and percentage)
- Stratified summaries (by geography, age cohort, provider, etc.)
- Line lists for targeted follow-up (for authorized users)
- Export formats suitable for analysis and submission workflows (e.g., CSV/Excel/PDF as applicable)

Section 4.2.2.5. Support scalable data exchange and reporting via read replica integration

4.2.2.5.1.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

- **4.2.2.5.1.** Whether the solution includes a read-only replica or equivalent mechanism to support downstream data access.

Response:

Yes, the proposed IIS supports secure read-only access to downstream systems through both traditional read-replica mechanisms and equivalent, analytics-optimized data access endpoints.

WebIZ can provide read-only access to near-real-time transactional data using standard database replication patterns that enforce separation of read and write operations. In addition, the IIS offers modern, read-only analytics endpoints operating on curated datasets that are fully isolated from production workloads. These mechanisms enable reporting, analytics, and external system integration while protecting production performance, data integrity, and security.

4.2.2.5.2.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

- **4.2.2.5.2.** The typical update frequency of the replica (e.g., near real-time, hourly, daily)

Response:

Envision’s IIS utilizes Microsoft SQL Server deployed in an Always On High Availability configuration within Azure Government.

- The primary and secondary replicas operate in synchronous replication mode, ensuring zero-data-loss failover and real-time transactional consistency between those nodes.
- At additional cost, a third asynchronous replica may be provisioned to serve as a dedicated read-only reporting replica. This replica receives updates in near real-time, with minimal latency dependent on workload and network conditions.
- In addition, transactional data is replicated to Microsoft Fabric (hosted in Azure Commercial) on a daily refresh cadence to support advanced analytics, cross-system integration, and reporting use cases. The architecture is designed to support increased refresh frequency as needed.

This multi-tiered approach enables both near real-time operational reporting and scheduled analytical data processing without impacting WebIZ’s production environment’s performance.

4.2.2.5.3.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

4.2.2.5.3. How read-only access is managed to avoid performance or integrity impacts on the production environment.

Response:

Envision’s read-only access is architecturally isolated from the Production write workload using dedicated SQL Server replicas and analytics endpoints.

- Production write activity is restricted to the primary replica within the Always On Availability Group.
- Read-intensive queries are directed to either:
 - The secondary replica(s), or
 - A dedicated asynchronous read-only replica (if provisioned), or
 - Microsoft Fabric analytics endpoints.

This separation ensures that reporting, ad hoc querying, and downstream system integration do not compete with transactional workloads.

Additional safeguards include:

- Enforcement of read-only database roles and permissions.
- Network segmentation within Azure Government to limit direct access.
- Query monitoring and resource utilization tracking to identify and remediate inefficient workloads.
- Independent analytics capacity within Fabric, fully isolated from the transactional SQL environment.

Together, these controls preserve Production database integrity, maintain system performance, and prevent reporting workloads from affecting immunization data capture or HL7 processing.

4.2.2.5.4.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

4.2.2.5.4. The Vendor's approach to configuring, deploying, and maintaining the replication process.

Response:

Envision’s replication process is configured using Microsoft SQL Server Always On Availability Groups, deployed within Azure Government using established infrastructure standards and configuration management practices.

The approach includes:

- Provisioning of SQL Server nodes and Availability Groups using standardized deployment processes.
- Configuration of synchronous replication between primary and secondary replicas to ensure high availability.
- Optional configuration of an asynchronous replica dedicated to read-only reporting workloads.
- Scheduled replication workflows to Microsoft Fabric for analytics and cross-environment data access.

Ongoing maintenance activities include:

- Monitoring replication health and synchronization status.

- Applying SQL Server security updates and cumulative updates in accordance with change management procedures.
- Periodic validation of failover capability and replication integrity.
- Documentation and version control of configuration settings and architecture changes.

This structured approach ensures reliable replication performance while supporting long-term scalability and operational stability.

4.2.2.5.5.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

- **4.2.2.5.5.** Support services provided for monitoring, troubleshooting, and ensuring data consistency between environments.

Response:

Envision’s WebIZ environment includes proactive monitoring and operational support services to ensure replication health and data consistency.

Monitoring is performed using a combination of Site24x7 and Azure Monitor for infrastructure health, SQL performance metrics, Availability Group status, external availability monitoring, and alerting.

Replication-specific monitoring includes:

- Tracking synchronization status across replicas.
- Replication latency monitoring for asynchronous replicas.
- SQL performance metrics and query analysis.
- Alerting for failover events or replication degradation.

Operational support teams respond to alerts in accordance with established service-level agreements. Troubleshooting procedures include validation of replication status, log review, and controlled failover testing when necessary.

Annual disaster recovery exercises further validate replica integrity and recovery readiness.

4.2.2.5.6.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

- **4.2.2.5.6.** Availability of documentation describing the replication architecture, update cadence, and access protocols.

Response:

Envision maintains comprehensive documentation describing WebIZ’s replication architecture and associated operational procedures.

Documentation includes:

- Architecture diagrams illustrating Always On Availability Group topology.
- Description of synchronous and asynchronous replication models.
- Defined update cadence for SQL replication and Fabric data refresh processes.

- Access protocols and authentication mechanisms (SQL authentication for Azure Government SQL environments and Microsoft Entra ID authentication for Fabric endpoints).
- Change management and failover procedures.

This documentation is maintained as part of operational governance and is available to the Agency upon request to support transparency, audit readiness, and integration planning.

4.2.2.5.7.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

4.2.2.5.7. Methods for enabling secure, efficient querying by authorized users.

Response:

Envision enables secure querying through controlled, read-only access mechanisms aligned with the hosting environment.

For SQL Server replicas hosted in Azure Government:

- Direct read-only SQL access may be provisioned using SQL authentication.
- Access is restricted to authorized users and scoped to defined database roles.
- Network controls and firewall rules limit connectivity to approved endpoints.
- Least-privilege principles are enforced to restrict write operations and sensitive administrative functions.

For analytics workloads within Microsoft Fabric:

- Authentication is managed through Microsoft Entra ID (Azure AD).
- External jurisdiction users may be provisioned via guest access within Entra ID.
- Role-based access controls govern dataset and endpoint visibility.

This dual-environment model enables efficient querying for reporting and analytics while preserving security boundaries between Azure Government transactional systems and Fabric analytics services.

4.2.2.5.8.

Request:

The Vendor should describe how their proposed IIS supports the use of a read-only replica of the production database to facilitate reporting, analytics, and external system access. Responses should address the following:

4.2.2.5.8. Methods for quantifying volume of data interfaced inbound and outbound from primary database, whether via established interface traffic, or one time data extracts.

Response:

Envision’s WebIZ platform includes comprehensive mechanisms for quantifying inbound and outbound data volumes from the primary database, including established interface traffic, interoperability transactions, and one-time data extracts.

WebIZ operates within a high-availability architecture that supports disaster recovery and workload distribution, enabling monitoring of database activity, replication traffic, and read-only access patterns. In addition, the IIS maintains detailed logging and metrics for interoperability workflows, including HL7 v2 message exchange and other interface-based data integrations. These logs capture message counts, data volumes, and transaction activity and are accessible through operational tooling, reports, dashboards, and self-service analytics.

WebIZ also provides a purpose-built analytics capacity that is fully isolated from the transactional Production database. This environment enables independent monitoring of query activity, data refresh operations, and outbound data usage associated with reporting, dashboards, and external analytics consumers, without impacting day-to-day IIS operations.

Together, these capabilities provide the Agency with clear visibility into data exchange volumes for operational oversight, capacity planning, and compliance reporting.

4.2.2.6. Database schema and data dictionary

4.2.2.6.1.

Request: The Vendor should provide a complete database schema and data dictionary for the proposed IIS solution. These artifacts should include:

4.2.2.6.1. Entity-relationship diagrams or equivalent schema documentation.

Response:

Envision maintains an up-to-date data dictionary and releases updated versions of the document in alignment with each Production transactional database release. This documentation describes entities, attributes, relationships, data types, validation rules, and business logic to support transparency into how immunization data is stored, validated, and exchanged.

In addition, WebIZ includes a purpose-built analytics capacity based on a curated, gold-tier (medallion) data architecture. This analytics layer provides highly curated, analytics-ready datasets that include computed and derived values, reducing downstream data wrangling and improving consistency for reporting, dashboards, and self-service analytics. When accessing data through modern analytics endpoints, data dictionary definitions are available directly within the model to support discoverability and ease of use.

Both database schema and data dictionary will be delivered to West Virginia upon contract execution and be maintained for the life of the contract.

4.2.2.6.2.

Request: The Vendor should provide a complete database schema and data dictionary for the proposed IIS solution. These artifacts should include:

4.2.2.6.2. Field-level definitions, including data types, constraints, and allowable values.

Response:

As described in the response to Section 4.2.2.6.1, the WebIZ solution includes a complete and current data dictionary with comprehensive field-level definitions. This documentation specifies data types, constraints, validation rules, and allowable values for all database fields, ensuring clarity, consistency, and data quality across all IIS functions and interfaces.

4.2.2.6.3.

Request: The Vendor should provide a complete database schema and data dictionary for the proposed IIS solution. These artifacts should include:

4.2.2.6.3. Definitions of key tables, such as patient records, vaccination events, inventory, exemptions, and school roster modules.

Response:

The WebIZ database schema and data dictionary include clear definitions of all key IIS tables and modules, including patient records, vaccination events, inventory management, exemption tracking, and school roster functionality. Envision’s documentation describes each table’s purpose, primary attributes, relationships to other entities, and its role within core IIS workflows.

4.2.2.6.4.

Request: The Vendor should provide a complete database schema and data dictionary for the proposed IIS solution. These artifacts should include:

4.2.2.6.4. Mapping to CDC HL7 v2.5.1 standards, where applicable.

Response:

Where applicable, the WebIZ database schema and data dictionary include mappings to CDC HL7 v2.5.1 standards. Largely, this is more in line with the HL7 Implementation Guide than the database schema documentation. These mappings identify corresponding HL7 segments, fields, and code sets to support standards-based data exchange, interoperability, and compliance with CDC IIS reporting requirements.

4.2.2.6.5.

Request: The Vendor should provide a complete database schema and data dictionary for the proposed IIS solution. These artifacts should include:

4.2.2.6.5. Versioning and update protocols for schema changes over time.

Response:

WebIZ schema and data dictionary artifacts are versioned and maintained using formal change management processes. Updates are documented with version history and release notes and are published in coordination with system releases to ensure transparency, backward compatibility considerations, and clear communication of schema changes over time.

Section 4.2.2.7. Oral Health Module

4.2.2.7.1

Request:

4.2.2.7.1 Roster Integration - Students should be linkable to schools via rosters, enabling targeted outreach and reporting by school, grade, and county. This supports identification of geographic and demographic gaps in oral health coverage.

Response:

The new Oral Health module will support integration with school enrollment rosters to enable linkage by school, grade, and county. Student records within the module may be associated with existing patient identities to support consistency across school-based health programs. The module will be accessible to authorized WebIZ users through established authentication and role-based access controls. Additionally, through design sessions, data from the module may be made available for self-service analytics and reporting.

4.2.2.7.2

Request:

4.2.2.7.2. Dual Workflows:

4.2.2.7.2.1. Dental Professionals should be able to enter administered oral health records directly into the IIS, ensuring timely documentation of care.

4.2.2.7.2.2. School Nurses should be able to enter historical records and manage rosters, supporting continuity of care and retrospective data entry.

Response:

The Oral Health module will be designed to support role-based workflows appropriate to school-based oral health programs. Dental professionals will be able to document oral health screenings and preventive services using clinically appropriate data entry interfaces.

School nurses and authorized school personnel will be able to manage student rosters, support historical or retrospective data entry, and access oral health information necessary to support continuity of care and school reporting requirements.

4.2.2.7.3

Request:

4.2.2.7.3. Reporting Capabilities - The modules should support reporting that:

- 4.2.2.7.3.1.** Identify students with or without oral health records.
- 4.2.2.7.3.2.** Filters by urgency of care, school, grade, and county to prioritize outreach and follow-up for high-need populations.

Response:

The module will include the ability to identify students with and without documented oral health screenings or services. Reports may be filtered by school, grade, county, and other relevant attributes to support prioritization of outreach and follow-up activities, particularly for populations with elevated oral health needs.

4.2.2.7.4

Request:

4.2.2.7.4. User Access and Permissions: The Oral Health module should leverage the system's role-based access control framework as defined in the **IIS Base Line Requirements RTM**. Specifically:

- 4.2.2.7.4.1.** Dental Professionals should be assigned appropriate roles and included in the provider dropdown menu.
- 4.2.2.7.4.2.** School Nurses must be granted access to oral health reports and health service functionality.
- 4.2.2.7.4.3.** The permissions "Enable Oral Health Reports" and "Enable Health Service" should be assignable individually or in bulk, using the system's master role update capability.
- 4.2.2.7.4.4.** Jurisdictional administrators must be able to configure, modify, and deactivate roles and permissions in accordance with jurisdictional policies.

Response:

The Oral Health module will leverage role-based access control consistent with the IIS Baseline Requirements RTM. Dental professionals will be assigned provider-appropriate roles with access to oral health documentation and reporting capabilities. School nurses will be granted access to oral health reports and health service-related functionality appropriate to their responsibilities.

Permissions such as "Enable Oral Health Reports" (TBD) and "Enable Health Service" (TBD) may be assigned to users individually using system role management capabilities. With configuration or modification, the system can be extended to support bulk assignment of roles and permissions to streamline administration for large user groups.

Jurisdictional administrators will be able to configure, modify, and deactivate roles and permissions, and manage reporting access, in accordance with state and local policies.

4.2.2.8. Next-generation interoperability with FHIR standards

4.2.2.8.1.

Request:

The Vendor should describe their methodology for supporting the HL7 FHIR standard for immunization data exchange as an optional, innovative feature. The response should detail the following:

- 4.2.2.8.1. FHIR Standard Support:** Which FHIR Release (e.g., R4) the system supports for public health, specifically for the electronic exchange of immunization data.

Response:

FHIR R4 has been selected due to its maturity, broad industry adoption, and alignment with national interoperability initiatives. Envision's FHIR strategy aligns with applicable R4 specifications to ensure consistency with emerging CDC, CMS, and ONC guidance.

Envision's entire interoperability team is FHIR-certified with substantial experience in designing and validating FHIR-based immunization workflows. This includes co-authoring FHIR specifications for Clinical

Decision Support operations and Bulk Data Export, co-chairing the HL7 Immunization User Group, participating in interoperability hackathons, and completing ONC §170(g)(10) conformance testing for FHIR Bulk Data Export.

4.2.2.8.2.

Request:

The Vendor should describe their methodology for supporting the HL7 FHIR standard for immunization data exchange as an optional, innovative feature. The response should detail the following:

4.2.2.8.2. Required Resources: The Vendor should demonstrate capabilities for securely generating and receiving data using the HL7 FHIR *Immunization* resource, which represents vaccine administration events, and the HL7 FHIR *Immunization Recommendation* resource, which conveys patient-specific immunization forecasting and recommended actions. These resources must be implemented in alignment with the applicable FHIR Release (e.g., R4) to ensure consistency with national interoperability standards.

Response:

Envision's FHIR implementation supports the FHIR Immunization and Immunization Recommendation resources aligned with R4 specifications.

FHIR Bulk Data Export (Mid-2027 Release):

Patient, Immunization, Immunization Evaluation + Recommendation resources will be available through FHIR Bulk Data Export operations, enabling secure, population-level data retrieval for analytics, reporting, and authorized secondary use cases.

Transactional FHIR Operations:

Individual Create, Read, Update, and Delete operations on Immunization and Immunization Recommendation resources (as opposed to bulk export operations) are not currently in scope of the product roadmap. Support for transactional FHIR operations and bidirectional exchange patterns will be assessed and scoped based on West Virginia's specific use case requirements, with capabilities beyond the current roadmap subject to additional scope and cost considerations.

Our FHIR-certified team has contributed to the development of immunization resource specifications through HL7 working groups and ONC conformance testing, ensuring alignment with national standards.

4.2.2.8.3.

Request:

The Vendor should describe their methodology for supporting the HL7 FHIR standard for immunization data exchange as an optional, innovative feature. The response should detail the following:

4.2.2.8.3. Roadmap and Timeline: A detailed plan, including a project roadmap and timeline, for the development and testing of FHIR-based data exchange capabilities. This should confirm FHIR support will be implemented as an addition to, or in parallel with, the existing mandatory HL7 v2.5.1 interfaces.

Response:

Envision's FHIR roadmap follows a phased approach:

Phase 1 – Design & Planning (Q3 2026):

Scope confirmation, architecture review, and partner alignment based on West Virginia's FHIR use cases.

Phase 2 – Build (Q4 2026):

Develop FHIR Bulk Data Export with security controls and integration to curated analytics dataset.

Phase 3 – Validation & Release (Mid-2027):

Conformance testing, documentation, and production enablement

Additional FHIR capabilities beyond Bulk Data Export will be scoped based on West Virginia's requirements and interoperability partner readiness. This approach introduces FHIR incrementally without disrupting existing HL7 v2 operations.

4.2.2.8.4.

Request:

The Vendor should describe their methodology for supporting the HL7 FHIR standard for immunization data exchange as an optional, innovative feature. The response should detail the following:

4.2.2.8.4. API Documentation: Confirmation that comprehensive, public-facing API documentation for all FHIR endpoints will be provided to the Agency and potential IIS partners.

Response:

Envision will provide comprehensive, public-facing FHIR API documentation including:

- FHIR Capability Statements (machine-readable and human-readable).
- Resource profiles with required elements, extensions, and value sets.
- Authentication and security specifications (OAuth 2.0, SMART-on-FHIR).

Documentation will be delivered through a developer portal with an interactive API explorer, OpenAPI/Swagger specifications, and HL7 Implementation Guide format. Both technical and business-oriented documentation will be provided to the Agency and authorized partners with version-controlled updates aligned to product releases.

Section 4.2.3 Approach & Methodology to Compliance with Mandatory Project Requirements

4.2.3.1.

Request:

4.2.3.1. Vendors must ensure their proposed system meets all essential requirements outlined in **Attachment B- IIS Baseline Requirements RTM** as required by the CDC. Vendors are required to provide a response to each field under the column labeled Vendor Response, including those related to optional functionality. As part of the technical submission, Vendors must provide printed, bound physical copies of their completed RTM responses. The printed copies must include the following RTM pages:

- 4.2.3.1.1. Administer System
- 4.2.3.1.2. Manage Organizations and Facilities
- 4.2.3.1.3. Manage Users
- 4.2.3.1.4. Support Interoperability
- 4.2.3.1.5. Ensure Data Quality
- 4.2.3.1.6. Evaluate and Forecast
- 4.2.3.1.7. Manage Patient and Immunization Record
- 4.2.3.1.8. Manage Vaccine Inventory
- 4.2.3.1.9. Provide Data Access
- 4.2.3.1.10. Non-functional

Vendors are responsible for ensuring that the printed version is complete, legible, and organized in a manner that allows evaluators to readily verify compliance with each requirement.

Response:

WebIZ is highly aligned with the full set of IIS baseline requirements. WebIZ meets all 552 Essential requirements, with only few product customizations along with an overwhelming majority of the Optional requirements. Please refer to the bound physical copy of our complete RTM with detailed responses.

4.2.3.2.

Request:

4.2.3.2. System Compatibility Requirements: The IIS must be designed to operate reliably and efficiently within a variety of standard computing environments.

- 4.2.3.2.1. The IIS must be cloud based software with hosting provided by the vendor.
- 4.2.3.2.2. The IIS must be fully compatible with major, up-to-date web browsers including but not limited to Google Chrome, Mozilla Firefox, Microsoft Edge, and Safari.
- 4.2.3.2.3. The IIS must operate efficiently on standard desktop and laptop computers without requiring specialized hardware or software installations.
- 4.2.3.2.4. The IIS must be accessible without requiring elevated user permission or local software installation. Only a supported web browser and internet access should be required for full functionality.

Response:

WebIZ is designed to operate reliably and efficiently within a variety of standard computing environments, meeting all specified compatibility requirements.

Cloud-Based Software:

WebIZ is a fully cloud-based Software-as-a-Service (SaaS) solution hosted in the Azure Government Cloud with no on-premises infrastructure required. All application hosting, data storage, processing, and system maintenance are provided by Envision through geographically distributed Azure Government data centers within the continental United States.

Browser Compatibility:

WebIZ is fully compatible with major, up-to-date web browsers including Google Chrome, Microsoft Edge, and other Chromium-based browsers.

Standard Desktop/Laptop Operation:

WebIZ operates efficiently on standard desktop and laptop computers without requiring specialized hardware or software installations. Minimum system requirements align with the ability to run a modern web browser (Windows, macOS, Linux, Chrome OS). No specific processor, memory, or storage requirements beyond those needed for browser operation.

Accessible Without Elevated Permissions:

WebIZ is accessible without requiring elevated user permissions or local software installation. Again, an exception being a PDF viewer is required for viewing PDF-based reports.

4.2.3.3.

Request:

4.2.3.3. Service Level Agreement - Service levels, response times, resolution targets, and associated penalties shall be governed by the Service Level Agreement (SLA) provided as a separate attachment to this RFP. (Attachment C)

Response:

A differentiator with Envision is we consistently meet/exceed our SLAs and not had an instance where missing an SLA has resulted in financial penalty. We understand the SLAs put forward in attachment C and look forward to collaborating with West Virginia DOH on clarifying language during contract negotiations. We understand SLAs will govern throughout the contract and accept the mutually agreed definitions and penalties that will emerge from contract negotiations for our failure to meet service expectations.

4.2.3.4.

Request:

4.2.3.4. Maintenance and Support: The vendor shall provide annual maintenance and support services for all implemented system components, including software, databases, interfaces, and infrastructure. These services must include:

- 4.2.3.4.1.** Help desk support available during standard business hours (Monday-Friday, 8:00 AM-5:00 PM local time), with documented escalation procedures.
- 4.2.3.4.2.** Bug fixes and security patches delivered within industry-standard timeframes, with critical vulnerabilities addressed promptly.
- 4.2.3.4.3.** System performance monitoring and proactive issue resolution for all hosted or managed environments.
- 4.2.3.4.4.** Version upgrades and compatibility assurance for all vendor-supplied components, ensuring continued compliance with CDC and state interoperability standards.
- 4.2.3.4.5.** Documentation updates reflecting any changes made during the maintenance period.

Response:

Envision takes great pride in providing WebIZ clients with high quality, maintenance and support services. Agency staff can expect to be supported by numerous teams, including:

Help Desk Support:

We understand the State currently operates under a combined Tier 1 /Tier 2 /Tier 3 support model in partnership with the existing vendor. We understand the specific split of responsibilities (e.g., password resets, role provisioning, interface triage) is not predetermined and will be jointly defined during implementation planning. Our proposed support model includes providing Tier 2/3 support for the Agency during standard business hours (Monday-Friday, 8:00 a.m. – 5:00 p.m. local time) including defined escalation procedures.

We are proposing similar support as currently proven successful with WV DOH in support of the NEDSS contract. Our preferred and supported method of communication with the Client Support Team (i.e., the Envision Help Desk) is via our Support Center application, powered by Jira. Using the Support Center provides a record of requests, response times, and configuration design decisions. Our Support Center provides guided experience for our clients to report issues, ensuring that Envision team members have the information necessary to assist and triage, minimizing the number of feedback loops required to reach resolution. Full support processes and contact information, including after-hours email and phone information, are provided during contract negotiations.

Envision's Client Support manages ongoing support services. We will integrate designated West Virginia DOH staff into our existing Support Center solution which allows users to submit support requests 24/7/365 online via our web portal. Please note that our preferred support method is via the Support Center for auditing and continuity.

Through our use of the Support Center, both Envision and end users communicate via the request ticket. This not only provides a written audit trail of communication and statuses but also provides a searchable source of questions and issues across jurisdictions that we leverage in issue resolution and to support real-time training on common errors and resolutions.

Our Support Center allows end users to open a ticket via a web portal or email and enables us to efficiently provide Tiers 1, 2, 3, and 4 support. Applicable response times are enforced within the Support Center software and escalations happen automatically if requests are not resolved within the appropriate timeframe. For Tier 2 through Tier 4 support items, our Client Support Specialists will work with the submitter to set priority on the request.

When a request is created in the Support Center, an email confirmation is sent to the submitter, and our Client Support Team is automatically notified of the submission via email. Our Client Support Specialists triage the ticket to verify the issue is clearly described or if additional information is needed from the submitter. Once triage is complete, the Client Support Specialist assigns the request to the appropriate support tier for prioritization and troubleshooting. Critical and High issues are immediately escalated to the Client Support Manager, Technical Managers, and Client Engagement Manager (CEM).

The request assignee works to analyze, reproduce, and resolve the issue. They have access to various resources, including Subject Matter Experts, to drive the investigation forward. If the assignee cannot resolve the issue, the ticket is escalated to the next support tier for troubleshooting, and the Client Support and Technical Managers are notified.

The Client Support Team will operate and respond to Agency Help Desk tickets within the established Service Level Agreement (SLA) between parties that will be finalized during contract negotiations and align with published expectations. Ticket categories include:

- Critical Severity - Issue that causes a complete system outage or renders the IIS unavailable for all users. Includes failures that prevent immunization data exchange with CDC IZ Gateway or other critical interfaces, or any security incident that compromises data integrity or confidentiality.
- High Severity - Issue that significantly impairs system functionality for a large group of users or a major module but does not cause a full system outage. Examples include failure of data migration processes, inability to generate required reports, or degraded performance that prevents timely immunization record access.

- **Medium Severity** - Issue that affects specific features, workflows, or a subset of users, but has a viable workaround. Examples include errors in non-critical modules, minor interface malfunctions, or delays in non-urgent data processing.
- **Low Severity** - Issue that has minimal impact on system functionality or user experience. Examples include cosmetic defects, minor documentation errors, or isolated user account issues.

Response times for these categories include:

- Critical; Response within 1 hour (generally under 10 minutes)
- High; Response within 2 hours (typically within 15 minutes)
- Medium; Response within 4 hours
- Low; Response within 24 hours

Bug Fixes:

Our Product team is responsible for researching and correcting all WebIZ bugs whether identified internally or by a client. In general, bugs are categorized and fixed in accordance with the following schedule (average time):

The following outlines our process for defect (bug) remediation.

1. Envision or any IIS user, which includes help desk staff, submits a Jira ticket with a description of the reported defect. The WV DOH staff perform initial review of all new bugs for consistency and accuracy. The WV DOH staff review the assigned category, severity, and problem description fields to verify the problem is sufficiently documented. The WV DOH and Envision jointly diagnose the defect and options for resolution.
2. Envision will research the ticket to confirm the defect. Communication on status and results of research will be maintained in the SysAid ticket. Our Client Success Manager will report and track the status of the SysAid ticket until the ticket is fully resolved.
3. Envision addresses bugs in severity and priority order as defined by our SLAs outlined in the following table.

Severity	Impact	Examples	Resolution/Release Expectation
Critical	<ul style="list-style-type: none"> • Critical functionality impacted • No work around • Causing data-corruption 	<ul style="list-style-type: none"> • Patient search doesn't work 	<ul style="list-style-type: none"> • Separate hotfix release ASAP once developed and passes QA testing
High	<ul style="list-style-type: none"> • Critical functionality impacted • Work around available • Highly visible bug impacting all users 	<ul style="list-style-type: none"> • Patient search doesn't work unless five characters are used for both first and last name • Patient search page is slow to load 	<ul style="list-style-type: none"> • Next scheduled monthly release (unless otherwise agreed upon)
Medium	<ul style="list-style-type: none"> • Product functionality impacted but not essential to product usage • User is still able to complete job/workflow 	<ul style="list-style-type: none"> • Report inconsistencies or reports of potential incorrect data on a report 	<ul style="list-style-type: none"> • Scheduled based on alignment with client
Low	<ul style="list-style-type: none"> • Product functionality not essential and/or low usage. 	<ul style="list-style-type: none"> • Text misspelled on page or in error message 	<ul style="list-style-type: none"> • Scheduled based on alignment with client

1. Envision and WV DOH collaborate to assign each bug to a target build based on the most likely target release to production.
2. Envision researches the problem, and if resolution requires programming changes, fixes the software and unit and solution tests the changes. DOH staff may assist with the resolution, for example to open and manage bug tickets.
3. Data fixes, requests for assistance, hard breaks, etc., may be fixed without programming, testing, and inclusion in a software build (e.g., mid-sprint deployment ["MSD"]). These fixes are more typically tested and deployed in a scheduled Agile release.
4. Envision updates the Jira ticket with the anticipated release date for each fix.
5. Once testing is conducted and the ticket receives the WV DOH approval, acceptance for the release is confirmed.

Note: Defects will be typically included with our standard product release functionality and WV DOH will have the opportunity to test the fix in the UAT region to accept the overall product release, including the particular defect.

System performance monitoring and proactive issue resolution:

We provide proactive environment monitoring of environmental health through monitoring servers, sites and logs using several different tools, including but not limited to:

- Azure Monitor
- Application Insights
- Site24x7.com

Together, these tools provide a comprehensive overview of the health of the applications we manage and the underlying infrastructure that the sites rely on to operate.

The IT Ops Team is responsible for meeting and exceeding WebIZ System Availability and System Performance SLAs. Other key responsibilities include:

- The IT Ops team manages disaster recovery and business continuity activities.
- The IT Ops team applies database solution updates, which:
 - Monitors IIS system performance to ensure system availability meets your expectations.
 - Managed deployments each month in accordance with established release schedule approved by the client.
 - Issues and manages VPN and Power BI XMLA credentials for your IIS staff.
 - Provided advanced system troubleshooting support, as necessary.

Our Security team is responsible for completing on-going security scans, proactively conducting vulnerability research and industry best practices, and installing necessary security patches in conjunction with Envision's IT Ops Team.

- The Security team provides additional security support, including:
 - Completes SOC 2 Type 2 security review for each instance of WebIZ.
 - Implements, maintains, and monitors system activity through our Web Application Firewall (WAF). The WAF is an additional value-added layer of security available to all WebIZ clients.
 - Available to support the Agency with security requests.

Version upgrades and compatibility:

Our Engineering team performs quality assurance (QA) testing across the WebIZ application to ensure consistent high quality for all our supplied components. We design test cases that are aligned to meet CDC IIS compliance metrics and project specifications, including, but not limited to:

- HL7 2.5.1 Implementation Guide
- VTrckS
- IZ Gateway

Documentation Updates:

Envision provides clients with Release Notes for every WebIZ deployment, which also includes applicable IT updates to the operating environment. Release Notes summarize application-related changes, enhancements, and updates made during each monthly maintenance period. Envision also provides clients with User Acceptance Test (UAT) cases during each monthly maintenance period. This allows IIS staff to execute test cases that were designed for all WebIZ changes, making it easier to understand new features and to verify bug fixes.

Envision’s entire team plays an important role in daily client communication, support, and overall delivery execution. As a WebIZ jurisdiction, you can expect Envision to treat your staff like an extension of our own team, with an unwavering focus on honesty and integrity.

Section 4.2.3.5. Data Storage

4.2.3.5.

Request:

4.2.3.5. Data Storage: The Vendor must store all IIS data - including backups, logs, and metadata - exclusively within data centers physically located in the continental United States of America (U.S.). No data may be transmitted, processed, or stored outside U.S. borders, including U.S. Territories, at any time, including but not limited to during disaster recovery, failover, or support operations. The Vendor must provide documentation verifying U.S.-based data residency and maintain compliance with applicable federal and state data protection laws and regulations.

Response:

WebIZ stores all IIS data—including backups, logs, and metadata—exclusively within data centers physically located in the continental United States. No data is transmitted, processed, or stored outside U.S. borders at any time, including during disaster recovery, failover, or support operations.

Infrastructure:

- Primary hosting: Azure Government Cloud, Virginia data center.
- Disaster recovery: Azure Government Cloud, geographically separated by at least 400 miles from primary location.
- Data isolation: West Virginia data is logically isolated with dedicated infrastructure controls.

Compliance Controls:

- Network firewalls configured to block all traffic outside the United States.
- Conditional Access policies in Microsoft Entra ID enforce U.S.-based authentication and administrative access.
- Azure Government Cloud infrastructure provides high compliance and contractual guarantees for U.S. data residency.

Envision maintains documentation verifying U.S.-based data residency and compliance with applicable federal and state data protection laws and regulations. This documentation is available for Agency review upon request.

4.2.3.5.1.

Request:

4.2.3.5.1. Business Continuity and Disaster Recovery (BCP/DR): The Vendor must maintain a documented Business Continuity Plan and Disaster Recovery plan for the IIS environment.

Requirements include:

4.2.3.5.1.1. Plan Documentation: Vendor shall provide copies of its BCP and DR plans to the Agency within 60 calendar days of contract execution and upon request thereafter.

4.2.3.5.1.2. NIST Alignment: Plans must be aligned with the most current version of NIST SP 800-34 (Contingency Planning Guide for Federal Information Systems) or successor publications, throughout the contract term.

4.2.3.5.1.3. Annual Testing: Vendor must conduct annual BCP/DR testing (tabletop or live failover exercises) and provide a summary report of results, corrective actions, and remediation timelines to the Agency within 30 calendar days of test completion.

4.2.3.5.1.4. U.S. Data Residency: All BCP/DR activities, including backups, failover, and recovery operations, must comply with Section

4.2.3.5. Data residency requirements (U.S.-based only).

4.2.3.5.1.5. Continuous Improvement: Vendor must update its BCP/DR plans within 60 calendar days of lessons learned from testing, incidents, or material changes to the hosting environment.

4.2.3.5.1.6. Certification: Vendor must annually certify to the Agency that its BCP/DR plans remain current, tested, and compliant with federal and state requirements.

Response:

Envision maintains documented Business Continuity and Disaster Recovery plans for the IIS environment and supporting infrastructure. These will be provided within 60 days of contract execution and upon Agency request throughout the life of the contract.

Our contingency planning follows NIST SP 800-34 guidance. Envision uses a standard DR approach across our platform, but recovery setup, failover design, and restoration steps may vary depending on the specific client environment and hosting configuration.

Envision reviews DR procedures at least annually through structured tabletop exercises to walk through recovery steps, roles, and communication paths. Any improvements identified during these reviews are documented and addressed.

Production systems and backups are hosted in U.S.-based Microsoft Azure Government regions to support U.S. data residency requirements.

DR documentation is updated as needed following testing, incidents, or significant system changes.

Section 4.2.3.6. Data Ownership

4.2.3.6.

Request:

4.2.3.6. Data Ownership

- 4.2.3.6.1.** The vendor must agree that the Agency retains full ownership of all data.
- 4.2.3.6.2.** The Vendor must agree that all data related to the execution of the contract is collected on behalf of, and remains the sole property of, the Agency.
- 4.2.3.6.3.** The Vendor must agree to provide privacy and security safeguards to protect all data from any use or disclosure for any purpose other than the described within this solicitation.
- 4.2.3.6.4.** The Vendor must return the entire dataset in a specified format upon request or contract termination at no additional cost and in a format specified by the Agency to ensure usability and accessibility.
- 4.2.3.6.5.** The Vendor must cooperate with the Agency and any subsequent Vendor should the contract, which is the subject of this RFP, be terminated, and to deliver any and all data, documentation, and associated work products to the Agency or its designee within thirty (30) working days of receipt of notice of contract termination.
- 4.2.3.6.6.** The Vendor must destroy all data in the System at the end of the contract and/or upon the request of the Agency in accordance with the most current version of the National Institute of Standards and Technology (NIST) Special Publication 800-88. Destruction of data shall not begin prior to receipt of written authorization from the Agency Project Manager and must be completed within 30 days of receipt of that authorization.

Response:

Envision acknowledges that the Agency retains full ownership of all data associated with the contract. All data processed by Envision is collected and maintained solely on behalf of the Agency.

Envision implements appropriate administrative, technical, and security controls to protect Agency data from unauthorized access, use, or disclosure, and only processes such data for purposes defined within the agreement.

Upon request or contract termination, Envision will provide the Agency’s data in a mutually agreed-upon standard export format without restriction, and will reasonably cooperate with transition activities to support migration to the Agency or a successor vendor.

Following confirmation of successful data return and written authorization from the Agency, Envision will securely delete Agency data from its systems in accordance with applicable NIST-aligned data destruction practices and established retention procedures.

Section 4.2.3.7. General Project Requirements

4.2.3.7.

Request:

4.2.3.7. General Project Requirement: Vendor must host an initial planning session(s) with the Agency within 30 days after project start date, with the goal to finalize the project plan and schedule.

Response:

Envision will conduct an initial project planning session with the jurisdiction within 30 days of project start. This session will formally initiate project activities and establish alignment across both teams on project objectives, governance structure, roles and responsibilities, communication cadence, and key milestones.

The planning session will also be used to review and refine the draft project plan and schedule, confirm

priorities, and identify any early risks or dependencies. Outcomes from this session will inform finalization of the project plan and ensure alignment with the approved implementation approach.

We will conduct additional sessions as needed to align on project plan and schedule.

4.2.3.7.1.

Request:

4.2.3.7.1. The Vendor's finalized Project Plan and Schedule must adhere to the Implementation Plan proposed in Section 4.2.2.2, subject to Agency review and approval.

Response:

Project Plan and Schedule:

Envision will develop and maintain a finalized Project Plan and Schedule that fully adheres to the Implementation Plan proposed in Section 4.2.2.2. The Project Plan will reflect the defined phases, workstreams, milestones, and governance controls described in the Implementation Plan, and will serve as the formal execution baseline upon jurisdiction approval.

A draft Project Plan and implementation schedule have been included as attachments to this RFP response for review. An image of the starting draft implementation schedule is included below to provide the Agency with a clear snapshot of the proposed sequencing and timelines. These documents demonstrate our structured implementation approach and reflect the methodology and sequencing outlined in Section 4.2.2.2.

ID	Task Mode	Task Name	Duration	Start	Finish	Predecessors
1		West Virginia IIS Implementation Project Schedule (DRAFT)	313 days	Wed 7/1/26	Fri 9/10/27	
2		Project Initiation and Governance	26 days	Wed 7/1/26	Wed 8/5/26	
3		Contract Execution	1 day	Wed 7/1/26	Wed 7/1/26	
4		Baseline Project Schedule Established	10 days	Thu 7/2/26	Wed 7/15/26	3
5		Joint Project Kick-Off Session	5 days	Thu 7/23/26	Wed 7/29/26	
6		Introduce Vendor and Jurisdiction teams	1 day	Thu 7/23/26	Thu 7/23/26	4FS+5 days
7		Review objectives, implementation approach, and expectations	2 days	Fri 7/24/26	Mon 7/27/26	6
8		Present major phases, timeline, and implementation plan	2 days	Tue 7/28/26	Wed 7/29/26	7
9		Baseline Project Deliverables Established	5 days	Thu 7/30/26	Wed 8/5/26	
10		Identify required deliverables	2 days	Thu 7/30/26	Fri 7/31/26	8
11		Share templates for project documentation	1 day	Mon 8/3/26	Mon 8/3/26	10
12		Confirm project deliverable acceptance criteria	1 day	Tue 8/4/26	Tue 8/4/26	11
13		Establish Shared Collaboration Spaces	1 day	Wed 8/5/26	Wed 8/5/26	12
14		Establish Initial Project Meeting Cadence	5 days	Thu 7/30/26	Wed 8/5/26	
15		Define project manager sync schedule	1 day	Thu 7/30/26	Thu 7/30/26	8
16		Define working group meeting schedule and cadence	2 days	Fri 7/31/26	Mon 8/3/26	15
17		Define steering committee schedule and cadence	2 days	Tue 8/4/26	Wed 8/5/26	16
18		Create Project RAIDD Log	5 days	Thu 7/30/26	Wed 8/5/26	
19		Stand up RAIDD tracking tool	1 day	Thu 7/30/26	Thu 7/30/26	8
20		Conduct initial risk identification session	2 days	Fri 7/31/26	Mon 8/3/26	19
21		Establish RAIDD maintenance and escalation process	2 days	Tue 8/4/26	Wed 8/5/26	20
22		<i>Project Initiation and Governance Complete</i>	<i>0 days</i>	<i>Wed 8/5/26</i>	<i>Wed 8/5/26</i>	<i>5,9,14,18</i>
23		Requirements Validation and Configuration	66 days	Thu 7/30/26	Thu 10/29/26	
24		Conduct Configuration JAD Sessions	5 days	Thu 7/30/26	Wed 8/5/26	
25		Review Web2 configuration options using live application	2 days	Thu 7/30/26	Fri 7/31/26	3FS+20 days
26		Document decisions in Configuration Specification	2 days	Mon 8/3/26	Tue 8/4/26	25
27		Validate decisions with Jurisdiction SMEs	1 day	Wed 8/5/26	Wed 8/5/26	26
28		Apply Backend Configuration (System Parameters)	15 days	Thu 8/6/26	Wed 8/26/26	
29		Update system parameter values via database scripts in DEV	5 days	Thu 8/6/26	Wed 8/12/26	27
30		Validate parameter changes in DEV	5 days	Thu 8/13/26	Wed 8/19/26	29
31		Prepare scripts for TEST and PROD deployment	5 days	Thu 8/20/26	Wed 8/26/26	30

Project Deliverables:

The table below identifies the project deliverables for the West Virginia IIS implementation. Each deliverable represents a formal milestone tied directly to the project schedule and major phases of work, including configuration, data migration, testing, training, and go-live readiness. Deliverables are considered complete upon successful completion of the associated activities and jurisdiction approval. Anticipated completion dates are provided for planning and tracking purposes:

Project Deliverable	Anticipated Completion Date
DELIVERABLE 1: Baseline Project Plan and Schedule	Tue 7/14/26
DELIVERABLE 2: Join Project Kickoff Completed	Tue 7/28/26
DELIVERABLE 3: Project Governance and RAIDD Framework Established	Tue 8/4/26
DELIVERABLE 4: Initial TEST/QA Data Load Completed	Tue 11/24/26
DELIVERABLE 5: Data Migration Fully Completed	Tue 7/6/27
DELIVERABLE 6: Initial Pre-Production Data Load & Validation Completed	Tue 2/9/27
DELIVERABLE 7: Application Environments Provisioned (DEV/TEST/PRE-PROD)	Fri 11/20/26
DELIVERABLE 8: Requirements and Configuration Specifications Approved	Fri 11/20/26
DELIVERABLE 9: HL7 Onboarding Documentation Package Delivered	Mon 8/31/26
DELIVERABLE 10: HL7 Interface Testing & Vendor Onboarding Approved	Wed 4/21/27
DELIVERABLE 11: Training Plan Delivered	Tue 12/15/26
DELIVERABLE 12: Comprehensive Test Plan Approved	Tue 2/23/27
DELIVERABLE 13: UAT Plan Delivered	Tue 3/2/27
DELIVERABLE 14: Go-Live Implementation & Cutover Plan Approved	Tue 6/29/27
DELIVERABLE 15: Production Go-Live Initiated	Fri 7/9/27
DELIVERABLE 16: Stabilization Period Completed	Tue 9/14/27

4.2.3.7.2.

Request:

4.2.3.7.2. Any deviation from the proposed Implementation Plan must be documented, justified, and approved by the Agency.

Response:

Envision recognizes the importance of maintaining alignment with the approved Implementation Plan. Any deviation will be formally documented, justified, and approved by the jurisdiction prior to adjusting the plan.

Approved deviations will be reflected in the updated Project Plan and recorded in the Change Control Register to ensure transparency and traceability.

4.2.3.7.3.

Request:

4.2.3.7.3. The Vendor shall not assess, invoice, or otherwise charge the Agency for any fees, including but not limited to annual licensing, subscription, hosting, maintenance, or support fees, during the Implementation Period. Payment for implementation services shall be tied to the successful completion of mutually agreed-upon implementation milestones established during the initial planning sessions and incorporated into the approved Project Plan. No milestone payment shall be due until the Agency has verified and approved completion of the corresponding milestone. Final implementation payment shall be made only upon the Agency's formal written Acceptance of the fully implemented IIS solution, as defined in Section "Acceptance Criteria." No recurring or annual fees shall begin or accrue until the system has been fully implemented, operational, and accepted by the Agency.

4.2.3.7.3.1. Milestone Definition and Approval: All implementation milestones must be jointly developed during the initial planning sessions and incorporated into the Vendor's Project Plan. Each milestone must include:

- 4.2.3.7.3.1.2.** A clear description of required deliverables
- 4.2.3.7.3.1.3.** Objective acceptance criteria
- 4.2.3.7.3.1.4.** Documentation requirements
- 4.2.3.7.3.1.5.** A proposed payment amount tied to that milestone.

Milestones are not valid until formally approved in writing by the Agency.

4.2.3.7.3.2. No Unilateral Changes: The Vendor may not add, remove, modify, subdivide, or consolidate milestones without the Agency's prior written approval. Any attempt to alter milestone definitions or payment amounts without approval is void and unenforceable.

4.2.3.7.3.3. Verification Before Payments: No milestone payment shall be due until the Agency verifies that all deliverables and acceptance criteria associated with that milestone have been fully met. Verification shall be documented in writing by the Agency.

4.2.3.7.3.4. No Partial or Conditional Payments: The Agency will not issue partial payments for partially completed milestones. Milestone payments are all-or-nothing and contingent upon full completion and Agency approval.

4.2.3.7.3.5. No Recurring Fees Before Final Acceptance: Regardless of milestone progress, annual, recurring, subscription, hosting, maintenance, or support fees will not begin or accrue until the Agency issues formal written Acceptance of the fully implemented IIS solution.

4.2.3.7.3.6. Milestone Failure and Remediation: If the Vendor fails to meet a milestone, the Agency may issue a Notice of Deficiency. The Vendor must remediate all deficiencies at no additional cost and resubmit the milestone for Agency verification. The Agency may repeat any testing or review necessary to confirm remediation.

Response:

It is crucial throughout the life of the contract that West Virginia has verifiable visibility and approval on all work before an invoice is submitted for processing. During the first 30-days, we will jointly develop implementation milestones in the schedule with West Virginia DOH. Outside of Project Plan, we will maintain a separate Excel workbook through the implementation phase that documents by month proposed deliverables with clear description of deliverable, acceptance criteria, documentation requirements and payment amount for the milestone. We will seek formal approval from WV DOH on the deliverable milestones and payments once complete. As we meet approved implementation deliverables, we will submit the workbook with deliverable criteria along with evidence for WV DOH review/approval. Once approved in full by WV DOH, approval will be documented in the workbook and invoice will be generated for WV processing and payment.

Any changes to the workbook's milestones or payment amounts need to go through formal change request processes requiring mutual agreement and ultimately WV DOH written approval.

We understand and accept that if we fail to meet a milestone the Agency may issue a Notice of Deficiency with our requirement to remediate deficiencies at no additional cost and resubmit the milestone for agency validation and acceptance.

Finally, there will be no recurring fees until final system acceptance which will occur at the end of our hyper-care period, 60 days following go-live of the new system.

4.2.3.7.4.

Request:

4.2.3.7.4. Liquidated Damages for Implementation Delays: The Agency reserves the right to assess liquidated damages if the Vendor fails to meet any mutually agreed-upon implementation milestone by the approved milestone due date. In such cases, the Agency may assess liquidated damages in the amount of \$500.00 per calendar day until the milestone is completed and verified by the Agency. For delays in achieving final system Acceptance, the Agency may assess liquidated damages at a rate of \$1,000.00 per calendar day. Total liquidated damages shall not exceed ten percent (10%) of the total implementation costs.

Response:

The key to success in all our IIS implementations has been a strong partnership between Envision and the Agency. The Envision project management approach is to utilize Agile combined with PMBOK and Waterfall when working on large-scale project implementations such as the West Virginia IIS deployment. The Agile methodology is incorporated into iterative software and solution development with transparent visibility of progress being made; PMBOK principles are used for managing the overall delivery, deliverables, and timeline on an ongoing basis; and the Waterfall technique is used for the up-front planning, analysis, and design sessions along with the formal testing in later stages of the deployment lifecycle. These integrated approaches help us to ensure that the solution, while structured, remains flexible enough to meet the needs of West Virginia, and fast-moving enough to meet the condensed timelines for migration.

Envision will create and maintain a detailed Project Management Plan. Envision’s Project Manager will utilize the Project Management Plan to monitor and maintain project risks, issues, decisions, and action items, and change requests and provide an update at least monthly. The Project Management Plan will include the following sections to support the management of the IIS project:

- Project Background and Objectives
- Project Staffing Plan and Team Structure (RACI)
- Project Governance and Decision Making
- Scope Management
- Schedule Management
- Budget Management
- Risk and Issue Management, Action, and Decision Plan (RAIDD Log)
- Change Control Management
- Quality Management
- Communication Management
- Requirements (configuration) Management
- Project Work and Milestones

Envision will schedule and facilitate weekly status meetings (typically via teleconference) and monthly leadership-level status/milestone meetings for visibility on the project and to review any updates to project schedule. We will work with WV DOH to mutually agree on all major implementation milestones, upon project commencement we will identify these in the plan as these would be the milestones applicable to liquidated damages. Rationale for this is that there is a mutual dependency on WV DOH and Envision to the successful execution of the plan and we understand based on experience there may be instances of additional time required on minor milestones that do not impact the overall project success. Our assumption too is liquidated damages would only be assessed after failed opportunity to cure where delay was sole fault of Envision that were not due to WV DOH delays or force majeure events.

Section 4.2.3.8. Vendor Staffing

4.2.3.8.

Request:

4.2.3.8. Vendor Staffing: The awarded Vendor will provide staffing resources to successfully complete the implementation tasks, including system configuration, customization, testing, training, and go-live support tasks to meet Agency requirements. The Vendor's internal policies and procedures for hiring must comply with:

4.2.3.8.1. WV Office of Technology Policies (<https://technology.wv.gov/policy-governance/ot-policies>)

4.2.3.8.2. Agency Office of Shared Administration the Office of Management Information Services (OMIS) Policy #0529 (Attachment D): Vendor/Contractor Employee Background Check Policy)

4.2.3.8.3. OMIS Procedure #OP-35 (Attachment E): Vendor/Contractor Employee Background Check Procedure), and Appendix A (Attachment F)

Response:

We will provide staffing resources necessary to meet Agency requirements for the WVSIS implementation activities and ongoing support. After review of the Vendor/Contractor Employee Background Check Policy, we request the State review our current background check policy that has been accepted by other State agencies receiving substantially similar services with access to substantially similar sensitive data. We do not fingerprint background check our employees but do require background checks that are substantially similar in their thoroughness.

Section 4.2.3.9. Project Manager

4.2.3.9.

Request:

4.2.3.9. Project Manager: The awarded Vendor will provide a project manager, and the Agency will engage a project manager during the system implementation phase.

Response:

Upon contract award, we will name our project manager who will engage with the Agency throughout the implementation phase. This individual will be supported by our Project Management Office and Director of Client Delivery throughout the implementation phase. Our PMO Manger is an MPH with 14 years of applied experience in epidemiology, disease surveillance, and public health informatics through hands on work at Department of Health and 10+ years of program management experience with a demonstrated ability to lead and organize cross-functional teams. Our Director of Client Delivery has 7+ years of IIS experience including several successful IIS implementations and modernization efforts.

Section 4.2.3.10. Comprehensive and Role-Specific Training

4.2.3.10.

Request:

4.2.3.10. The awarded Vendor must not only provide training materials but also submit a comprehensive, documented training plan. The goal is to ensure all user groups achieve full proficiency and maintain it throughout the contract term.

Response:

Envision will work closely with the Agency to finalize a comprehensive training plan for West Virginia's WebIZ implementation. Training plays a critical role in the success of any new IIS rollout, and it is important for us to learn more about your program's history, stakeholders, and other unique West Virginia-specific attributes. Based on that information, Envision will deliver a comprehensive training plan that is custom built for West Virginia IIS users statewide.

Envision’s training approach and materials align with a typical COTS solution installation. The following are the anticipated training deliverables for the West Virginia team to become familiar with WebIZ functionality:

- Written User Guides
- Recorded Step by Step Videos
- Weekly Office Hours/Training Sessions
- Train the Trainer Course

Written & Recorded Training Materials:

Envision has published the training materials for earlier versions of WebIZ on the helpdesk application. West Virginia is welcome to leverage those materials before and during the scheduled trainings.

These materials will be provided electronically to West Virginia. West Virginia will have full rights to reuse them “as is” for their training sessions or to modify them as they see fit.

Envision will be recording the weekly training sessions for West Virginia’s reference.

Prior to the Train the Trainer session, Envision will provide West Virginia with all video training materials generated to date in a shared file location. West Virginia can leverage these materials as needed and publish them to another location.

Weekly Training & Office Hours:

Envision will provide training sessions via Microsoft Teams on a weekly basis. Weekly sessions will be a combination of high-level overviews that support software configuration decisions and in-depth functionality review sessions. These sessions will provide background on configuration decisions and data conversion tasks and familiarize specific teams with the application. The agenda and schedule for these meetings will be determined as the implementation progresses.

West Virginia staff will be expected to have access to their own workstations to attend these webinars and follow along with the instructors. These training sessions will be recorded for future reference and will take place on Microsoft Teams. Specific dates will be defined in the Project Plan and will run alongside data conversion and app configuration meetings.

Train the Trainer Course:

Envision utilizes a “Train the Trainer” approach for End User Training. It is expected that the jurisdiction will identify staff who will be responsible for training the end users of the application. Envision will then train the appropriate personnel on all aspects of the WebIZ system. While the primary focus is on the features that are used by the typical user, it will also include all administrative-level capabilities. This session will be in a format specific to train the trainer. Attendees of this training will be demonstrating their knowledge on certain modules to prep them for training end users.

Once the West Virginia staff and trainers have completed the Envision-led training sessions, they can begin training end users, leveraging a variety of training mechanisms (webinars, recordings, and user guides, etc.). Envision has found that having a jurisdiction-level team to train the end users improves the likelihood of them asking questions once they begin using the production system. Envision will be available to support West Virginia staff in end-user training plan development. Execution of end-user training and coordination is the responsibility of West Virginia DOH.

West Virginia will provide workstations for participants to be able to access WebIZ during the training sessions. These training sessions will take place in West Virginia at a location to be mutually agreed upon between Envision and West Virginia DOH. Specific dates will be included in the project plan – approximately 6 months before go-live.

Training Considerations:

Envision’s Training Plan includes sections where West Virginia input will be considered prior to finalization. Input surrounding DOH teams to be trained and teams training end users will be clarified with DOH.

4.2.3.10.1

Request:

4.2.3.10.1. The Vendor’s response must include and detail the following mandatory requirements:

Role-Specific Training Strategy: The Vendor shall propose a detailed training plan tailored to the distinct needs and responsibilities of the following primary user roles (at minimum):

4.2.3.10.1.1. OEPS / Agency Administrator: Focus on system configuration, data quality monitoring, advanced reporting, and system maintenance tasks.

4.2.3.10.1.2. Provider Office Staff/ End-Users: Focus on day-to-day data entry, search/query functions, clinical decision support usage, and basic troubleshooting.

4.2.3.10.1.3. School Nurses/ Public Health Partners: Focus on roster management, exemption tracking, and public health follow-up workflows.

Response:

Envision’s role-based training strategy is built on experience. With twenty-one (21) successful implementations completed to date, our team has had plenty of opportunities to refine our training approach.

Envision utilizes a “train-the-trainer” strategy. Our team trains your team, and your team trains your users. While this process has proven successful, our team recognizes the importance of supplementing that approach with additional training methodologies. We will provide alternative training techniques to improve accessibility and condensing training sessions into smaller, more targeted content areas.

The following role-based training strategies are a starting point for the West Virginia WebIZ rollout.

Proposed Role-Based Trainings:

- **OEPS / Agency Administrator:** Envision classifies this category of users as “super users,” within WebIZ. Our team will begin training your staff early and often, and we will utilize both on-site and virtual training sessions. Because WebIZ has many advanced features that will be utilized by this role post go-live, our team will limit each session to one (1) or two (1) modules at a time. It’s important to really learn a module, before moving onto the next one. Each session typically lasts one (1) hour, although longer sessions may occur during on-site visits. This regular procession through the application is aimed at not overwhelming trainees and being respectful of day-to-day work requirements at the Agency.
 - Training Methods: In-person, Virtual, Training Videos, Workflow Documentation
 - Training Curriculum Topics:
 - Administration Session #1 – Managing Users, Providers/Clinics, and Schools
 - Administration Session #2 – Managing Code Tables and System Configuration
 - Administration Session #3 – Patient De-Duplication & Merging
 - Patients Session #1 – Search, Adding/Editing Patient Demographics
 - Patients Session #2 – Local IDs, Contacts, Programs, Notes, Allergies/Risks, Exemptions
 - Patients Session #3 – Adding New & Historical Immunizations
 - Inventory Session #1 – Inventory Locations, Manually Adding New Inventory
 - Inventory Session #2 – VTrckS API - Vaccine Orders, Shipments, Returns, Wastage
 - Clinic Tools – Clinic & Staff Enrollments, Storage Units, Managing Assets
 - Advanced Reporting – Reminder/Recall, VFC Reports, IQIP Reports
 - Power BI – Dashboard/Analytics
- **Provider Office Staff/End-Users:** Without question, this role will be utilized by the greatest number of IIS users. Since our training strategy for this category is “train-the trainer” our team will spend substantial time preparing your staff to complete independent WebIZ trainings. However, Envision

will provide the Agency with training videos and documentation to ensure users have multiple training options available to them.

- Training Methods: Training Videos, Workflow Documentation
- Training Curriculum Topics:
 - Patients Session #1 – Search, Adding/Editing Patient Demographics
 - Patients Session #2 – Adding Local IDs, Contacts, Programs, Notes, Allergies/Risks, and Exemptions
 - Patients Session #3 – Adding New & Historical Immunizations
 - Inventory Session #1 – Inventory Locations, Manually Adding New Inventory
 - Inventory Session #2 – VTrckS API - Vaccine Orders, Shipments, Returns, Wastage
 - Clinic Tools – Submitting Clinic & Staff Enrollments, Adding Storage Units, and Managing Assets
 - Reporting – Patient-Level Reports
 - Advanced Reporting – Clinic Level Reports & Reminder/Recall
- **School Nurses / Public Health Partners:** This user role has limited access to features within WebIZ, and as such requires less overall training.
 - Training Methods: Training Videos, Workflow Documentation
 - Training Video Curriculum Topics:
 - Education Module 101: Building School Rosters & Exemption Tracking
 - School Nurse Reports

Note: Agency feedback is important to us, and our team plans to implement your training suggestions along the way.

4.2.3.10.2

Request:

4.2.3.10.2. Training Deliverables: The Vendor must provide current, digital, and user-specific training resources, including but not limited to:

4.2.3.10.2.1 On-demand video instructions or demonstrations for each user role.

4.2.3.10.2.2 Digital user guides or manuals for both functional and technical reference.

Response:

Envision agrees to provide current, digital, and user-specific training resources, including training videos and digital user guides to the Agency.

Envision will collaborate with the Agency to determine the most suitable place for hosting on-demand training videos. Our priority is making sure that they are easy to find, so that IIS users of all roles are adequately supported.

Envision’s Help Center feature provides detailed information and instructions on how to use each WebIZ module. Since it is accessible from within the application, it allows users to quickly find relevant WebIZ functional and technical references. For IIS staff, digital user guides, manuals, and technical references will also be available for self-service access/download from our online Knowledge Base. Note: This is a separate site with restricted access (only available to authorized IIS staff).

4.2.3.10.3

Request:

4.2.3.10.3. Post-Implementation Support and Refreshers: The Vendor must outline the type and duration of support and training to be provided after the system's Go-Live date. This must include:

4.2.3.10.3.1 Post-Implementation Support: A defined period of enhanced dedicated support to resolve user-adoption issues and ensure smooth transition.

4.2.3.10.3.2 Annual Training Refreshers: A plan for providing annual or on-demand refresher training modules and updated documentation to cover new system features, version upgrades, and changes to federal or jurisdictional standards.

Response:

Envision utilizes a sixty (60) day, post implementation “hyper-care period” to stabilize the immediate uptick in maintenance and support needed for the Agency after go-live.

The hyper-care period starts at go-live. Envision will send a small team to West Virginia to work alongside your IIS staff for the entire first week of statewide WebIZ usage. In addition, Envision will increase the number of remote staff that will virtually support the Agency during those sixty (60) months. This means more staff monitoring your help desk tickets and responding to any reported issues. Envision will host daily virtual sessions allowing your staff to bring questions for immediate response and to receive additional micro-training on specific topics.

As the end of hyper-care approaches, Envision will slowly start scaling back support staff to align to on-going maintenance and support levels SLAs. Our singular goal of hyper-care is to be there for your IIS staff, and the Agency will have the full support of our entire team.

At the completion of the first year of maintenance and support, Envision will work with the Agency to evaluate existing training materials, and provide updated documentation that is reflective of new system features and modifications that have occurred since go-live. This will also include refresher training for West Virginia. Additionally, on-demand training typically occurs through our regular bi-weekly meetings with clients where we may bring in SMEs to address the topic or in our community meetings where we may address a topic/training for the entire community. Throughout the life of the contract we will work with WV DOH to identify training needs and an appropriate strategy to address.

Section 4.2.3.11 Privacy

4.2.3.11.

Request:

4.2.3.11. Privacy

- 4.2.3.11.1.** The Vendor must comply with all relevant State and Federal Data Privacy Laws, Regulations, and Policies.
- 4.2.3.11.2.** The IIS must maintain an internal audit log of all user access and activity, including logins, data additions, edits, deletions, and exports. The Agency is required to keep the data for 6 years and Vendor must provide this to the agency at designated timeframes or upon request. Access to audit logs shall be limited to authorized Agency staff and may be used for compliance monitoring or investigation of suspected breaches.
- 4.2.3.11.3.** If a data breach is discovered or suspected Vendor shall immediately follow the process outlined in the most recent version of the Office of Management Information Services Incident Reporting and Response Procedures, (Attachment G) https://www.wvdhhr.org/mis/policies/Incident_Reporting_and_Response.pdf
- 4.2.3.11.4.** The Vendor shall ensure that data maintained on behalf of the IIS is not used, released, or sold without specific authorization of the Agency, regardless of whether the data has been de-identified or included with a limited data set.
- 4.2.3.11.5.** The Vendor must certify that it is not currently under investigation by any state or federal authority for a breach of data security.
- 4.2.3.11.6.** The Vendor must disclose whether it has been involved in any breach of data security and provide details relating to the causes of the breach and the mitigating actions taken in response to the breach.
- 4.2.3.11.7.** The vendor must disclose details of any previous or current investigation by any state or federal authority, including investigations that did not result in formal sanctions, related to privacy or security of patient information. The details must include the resulting corrective action plan or details of the final resolution, including the assessment of any fines or other sanctions against the Vendor.
 - 4.2.3.11.7.1.** The State reserves the right to request supporting documentation or conduct independent verification. Failure to disclose relevant investigations may result in disqualification, contract termination, or other remedies.
- 4.2.3.11.8.** The Vendor must certify that it has never been convicted of, charged with, or is under investigation for, violation of any criminal law, or violation of any civil law governing health care fraud, abuse, or waste.
- 4.2.3.11.9.** The Vendor must certify that it does not employ any individuals who have been excluded or debarred by the federal or any state government from participating in any federal or state programs or contracts.
- 4.2.3.11.10.** The Vendor shall not use the IIS data for analytics, AI/ML training, model development, or any secondary purpose without explicit written approval from the State.

Response:

Envision confirms it complies with the requirements in Sections 4.2.3.11.1 through 4.2.3.11.10 related to data privacy, security controls, audit logging, breach response, investigation disclosure, workforce screening, and limits on secondary data use.

Envision maintains audit logs of user access and system activity, including logins, data creation, edits, deletions, and exports. Logs are retained according to established retention policies and can be provided to the Agency upon request. Access to these logs is restricted to authorized personnel and used only for security, compliance, or investigative purposes.

If a data breach is discovered or suspected, Envision follows its incident response procedures and will notify the Agency in accordance with required timelines.

Envision does not use, disclose, or sell IIS data without explicit authorization from the Agency, including data that has been de-identified or included in a limited dataset. IIS data will not be used for analytics, artificial intelligence or machine learning training, model development, or any other secondary purpose unless explicitly authorized in writing by the State.

Envision confirms it is not currently under investigation by any state or federal authority for a data security breach and will disclose any required information regarding past or future investigations as specified.

Envision conducts appropriate workforce screening and background verification processes in accordance with applicable laws and organizational policy.

Supporting documentation can be provided upon request to demonstrate compliance with these requirements.

Section 4.2.3.12 Security and Audit Compliance

4.2.3.12.1.

Request:

4.2.3.12.1. Federal Security Compliance Requirements: The Vendor must ensure the IIS solution complies with applicable federal cybersecurity standards, including:

4.2.3.12.1.1. FedRAMP Authorization: The solution must be FedRAMP Moderate or High authorized at the time of contract award. Vendors must provide proof of FedRAMP authorization (ATO letter or listing on the FedRAMP Marketplace). Cloud providers must also maintain FedRAMP Moderate or High authorization; SOC 2 Type II may be submitted only as supplemental evidence.

4.2.3.12.1.2 FIPS 140-2/3 Validated Cryptography: All cryptographic modules used for data at rest and in transit must be validated under NIST's Cryptographic Module Validation Program (CMVP).

4.2.3.12.1.3. Transport Layer Security (TLS): All IIS data exchanges, including connections to CDC's IZ Gateway, must use TLS in accordance with the most current version of NIST SP 800-52 (Guidelines for the Selection, Configuration, and Use of TLS Implementations). At minimum, the IIS must support TLS 1.2 and TLS 1.3 at contract award. Vendors must demonstrate the ability to implement newer TLS versions or configurations within 12 months of publication by NIST or CDC. All TLS implementations must use cryptographic modules validated to FIPS 140-2 or FIPS 140-3 under NIST's Cryptographic Module Validation Program (CMVP) and must employ only approved cipher suites.

4.2.3.12.1.4. Ongoing Compliance: Vendors must maintain compliance with evolving federal cybersecurity standards throughout the contract term and report any changes to FedRAMP authorization, FIPS validation, or TLS support within 30 days.

Response:

There is not an available IIS product that is FedRAMP authorized or in progress according to the FedRAMP marketplace. We understand the State's commitment to security compliance and we are confident we can work through gaps from the FedRAMP authorization during contract negotiations to prove security compliance and mitigate operational risk consistent with FedRAMP. While WebIZ is not directly FedRAMP authorized, our solution is hosted in Microsoft Azure Government, which holds a FedRAMP High authorization, and we leverage the security controls provided within that environment. Additionally, Envision maintains a current SOC 2 Type II report, which can be provided upon request.

All data in transit is encrypted using TLS 1.2 or higher in line with current NIST guidance and approved cipher suites. Encryption at rest and cryptographic modules are provided through Azure Government's FIPS 140-2 validated infrastructure.

Envision routinely monitors applicable federal security requirements and updates our configurations as needed to stay aligned with current standards. We are currently exploring FedRAMP authorization.

4.2.3.12.2.

Request:

4.2.3.12.2. SOC 2 Type II Audit Report

4.2.3.12.2.1. The awarded Vendor shall provide a current SOC 2 Type II audit report within 60 calendar days of the contract execution. The report must cover a review period ending no more than 12 months prior to submission and demonstrate compliance with the Trust Services Criteria for Security, Availability, Confidentiality, and Privacy.

4.2.3.12.2.2. The vendor shall provide an updated SOC 2 Type II audit report annually within 30 calendar days of the contract anniversary date for the duration of the contract term. The State reserves the right to review and approve the sufficiency of the report and may request additional documentation or clarification in the event of material changes to the Vendor's hosting environment or security posture.

4.2.3.12.2.3. ISO/IEC 27001 certification may be submitted as supplemental evidence of organizational security maturity but does not substitute for the SOC 2 Type II requirement or the State's U.S. data residency policy

Response:

Envision maintains a current SOC 2 Type II report covering the Trust Services Criteria for Security, Availability, and Confidentiality. The report period ended within the last twelve (12) months. A copy can be provided to the Agency upon request. Updated SOC 2 Type II reports are issued annually, and we will provide West Virginia the current SOC 2 Type II audit report annually within 30 calendar days of the contract anniversary date.

Envision acts as a data processor and handles Agency data only in accordance with contractual requirements. The Agency retains ownership of its data and determines how it is used.

4.2.3.12.3.

Request:

4.2.3.12.3. Penetration Testing and Vulnerability Management: The Vendor must perform third-party penetration testing of the hosted IIS environment on an annual basis, in compliance with NIST 800-53 standards. A detailed report of findings and remediation actions shall be submitted to the State within 30 calendar days of test completion. The Vendor shall maintain a documented vulnerability management program and address all critical or high-risk findings within 30 calendar days, unless otherwise approved by the State.

Response:

Envision conducts annual third-party penetration testing across its applications and supporting environments. Testing is performed by an independent security firm and includes validation of identified findings.

A summary report on findings and remediation actions will be provided to the State within 30 calendar days of test completion. Envision maintains an ongoing vulnerability management program to identify, track, and remediate security findings. Critical and high-risk vulnerabilities are prioritized and remediated in accordance with established internal timelines, meeting the 30-calendar day remediation unless otherwise approved by our clients.

4.2.3.12.4.

Request:

4.2.3.12.4. Secure Software Development Lifecycle (SSDLC) Practices: The Vendor must adhere to secure software development lifecycle (SSDLC) practices to ensure the IIS is developed, maintained, and operated in accordance with federal cybersecurity standards.

Requirements include:

4.2.3.12.4.1. Documented SSDLC Process: The Vendor shall maintain and provide documentation of secure development lifecycle practices, aligned with NIST SP 800-218 (*Secure Software Development Framework*) or equivalent.

4.2.3.12.4.2. Static and Dynamic Application Security Testing (SAST/DAST): The Vendor must perform SAST scans integrated into the development pipeline for every code commit or build and DAST scans at least quarterly and following any major release or production update. The Vendor must provide remediation plans for all identified vulnerabilities, with critical and high-risk findings resolved within 30 calendar days, unless otherwise approved by the Agency.

4.2.3.12.4.3. Vulnerability Management Integration: Findings from SAST/DAST must be incorporated into the Vendor's vulnerability management program, with remediation timelines consistent with Section 4.2.3.12.2.

4.2.3.12.4.4. Third-Party Component Security: The Vendor must track and document all third-party libraries and modules, ensuring they are updated and free of known critical vulnerabilities.

4.2.3.12.4.5. Continuous Monitoring: The Vendor must implement continuous monitoring practices consistent with FedRAMP and NIST guidance, including automated code scanning and penetration testing at least annually.

Response:

Envision follows documented SDLC practices aligned with NIST SP 800-218 (Secure Software Development Framework), with security integrated throughout design, development, and release.

SAST is integrated into our CI/CD pipeline and runs on every code commit. DAST is performed before every deployment. Findings are tracked through our vulnerability management program, and critical or high-risk issues are remediated within thirty (30) calendar days unless otherwise approved.

Third-party dependencies are monitored through automated scanning and managed as part of regular maintenance. Envision also conducts annual third-party penetration testing and maintains continuous security monitoring.

4.2.3.12.5.

Request:

4.2.3.12.5. Cloud Provider Attestations: If the Vendor utilizes a third-party cloud service provider, the Vendor shall provide:

4.2.3.12.5.1. Documentation confirming that the cloud provider maintains FedRAMP Moderate or High authorization; SOC 2 Type II may be submitted only as supplemental evidence.

4.2.3.12.5.2. Evidence that all IIS data is stored and processed exclusively within U.S.-based data centers, in compliance with federal government and West Virginia's cybersecurity and data residency requirements.

4.2.3.12.5.3. Supports compliance with applicable Executive Branch and Office of Management Information Services (OMIS) Security Policies.

Response:

Envision hosts its application in Microsoft Azure Government.

Azure Government maintains FedRAMP High authorization, and supporting documentation, including FedRAMP and SOC 2 Type II reports, can be provided upon request.

All IIS data is stored and processed in U.S.-based Azure Government data centers. Access to these environments is limited to screened U.S. personnel and designed to meet applicable federal and state cybersecurity and data residency requirements.

Our Azure Government deployment supports compliance with applicable Executive Branch and OMIS security policies through standard security controls such as encryption, access management, logging, and monitoring.

4.2.3.12.6.

Request:

4.2.3.12.6. Vendor Attestation Form:

- 4.2.3.12.6.1.** The awarded Vendor shall complete and submit a Vendor Attestation Form within 30 calendar days of contract execution, certifying compliance with the following:
 - 4.2.3.12.6.1.1.** U.S.-based data residency and transmission restrictions.
 - 4.2.3.12.6.1.2.** SOC Type II audit submission timelines.
 - 4.2.3.12.6.1.3.** Penetration testing and vulnerability remediation protocols.
 - 4.2.3.12.6.1.4.** Cloud provider compliance.
 - 4.2.3.12.6.1.5.** All applicable state and federal cybersecurity policies and standards.
 - 4.2.3.12.6.1.6.** All applicable state and federal information security and privacy requirements.

The State reserves the right to request updated attestations annually or upon material changes to the Vendor's operations or hosting environment. All vendor attestations are subject to verifications under Section 4.2.3.12.8. Audit and Attestation Requirements.

Response:

Envision will provide the completed Vendor Attestation Form within thirty (30) calendar days of contract execution, certifying compliance with the applicable requirements outlined in this section.

- U.S.-based data residency and transmission restrictions.
- SOC Type II audit submission timelines.
- Penetration testing and vulnerability remediation protocols.
- Cloud provider compliance.
- All applicable state and federal cybersecurity policies and standards.
- All applicable state and federal information security and privacy

4.2.3.12.7.

Request:

4.2.3.12.7. Incident Response (IR) Policy and Plan Requirements: The Vendor must maintain and provide documentation of its own incident response (IR) policy and plan, in addition to following the Agency's incident response procedures in **4.2.3.11.3**. Requirements include:

- 4.2.3.12.7.1. NIST Alignment:** The Vendor's IR policy and plan must be aligned with the most current version of NIST SP 800-61 (*Computer Security Incident Handling Guide*) or successor publications.
- 4.2.3.12.7.2. Ongoing Updates:** The Vendor must update its IR policy and plan within 6 months of any NIST revision or federal mandate affecting incident response practices.
- 4.2.3.12.7.3. Integration with Agency Plan:** The Vendor must demonstrate how its IR plan complements and integrates with the Agency's incident response procedures, ensuring coordinated detection, reporting, containment, eradication, and recovery.
- 4.2.3.12.7.4. Testing and Exercises:** The Vendor must conduct annual incident response exercises (e.g., tabletop or simulated breach scenarios) and provide summary reports of findings and corrective actions to the Agency within 30 calendar days.
- 4.2.3.12.7.5. Availability:** The Vendor must make its IR policy and plan available to the Agency upon request and certify compliance annually.
- 4.2.3.12.7.6. Continuous Improvement:** The Vendor must incorporate lessons learned from incidents and exercises into its IR plan within 60 calendar days of identification.

Response:

Envision maintains a documented Incident Response (IR) Policy and Plan aligned with NIST SP 800-61.

Our IR policy and plan are reviewed and updated as needed, including within six (6) months of any new federal mandate affecting incident response practices.

Envision's incident response procedures are designed to integrate with Agency processes to ensure coordinated detection, reporting, containment, eradication, and recovery activities.

Envision conducts annual incident response testing, including tabletop or simulated scenarios, and provide summary reports of findings and corrective actions within thirty (30) calendar days.

A client-facing version of our Incident Response Policy and Plan can be provided upon request, and lessons learned from incidents and exercises are incorporated into the plan within sixty (60) calendar days of identification.

4.2.3.12.8.

Request:

4.2.3.12.8. Audit and Attestation Requirements: The State reserves the right to audit or request attestation regarding any security controls required under this contract. The Vendor shall:

4.2.3.12.8.1. Provide Evidence at No Cost: Supply system documentation, policies, configurations, testing results, audit reports, or other evidence necessary to verify compliance at the State's request, without additional cost.

4.2.3.12.8.2. Timely Response: Provide requested evidence within 30 calendar days of the State's request, unless otherwise approved in writing by the Agency.

4.2.3.12.8.3. Independent Verification: Permit the State or its designated third-party auditor to conduct independent verification of security controls, including site visits or technical assessments, with reasonable notice.

4.2.3.12.8.4. Ongoing Attestation: Complete and submit updated attestation forms annually, or upon material changes to the Vendor's hosting environment, security posture, or compliance status.

4.2.3.12.8.5. Future Standards Alignment: Ensure that audits and attestations remain aligned with the most current versions of applicable federal and state cybersecurity standards (e.g., NIST, FedRAMP, FIPS, OMIS policies).

4.2.3.12.8.6. Remediation Obligation: Address any deficiencies identified during audits or attestations within 60 calendar days, or as otherwise approved by the Agency, and provide written confirmation of remediation.

Response:

Envision understands and accepts the State's audit and attestation requirements. We can provide documentation, policies, configurations, testing results, or audit reports at the State's request and will respond within 30 calendar days unless the Agency agrees to a different timeline in writing. We are open to independent verification by the State or a third-party auditor, including site visits or technical assessments, with reasonable notice. We will submit updated attestation forms annually and when there are any material changes to our hosting environment, security posture, or compliance status. Envision stays current with cybersecurity standards and will make sure our audits and attestations reflect that. If any deficiencies are found, we will address them within 60 calendar days, or a timeframe approved by the Agency and will confirm remediation in writing.

Section 4.2.3.13 Acceptance Criteria

4.2.3.13.1.

Request:

4.2.3.13.1. General Acceptance Requirement: The Agency will issue written Acceptance of the IIS solution only after verifying that all functional, technical, security, interoperability, and performance requirements defined in this Solicitation have been fully met. No portion of the system shall be considered Accepted until all Acceptance activities are completed and approved in writing by the Agency.

Response:

Envision will work closely with the Agency to achieve written Acceptance of the IIS solution (WebIZ) after verifying that all functional, technical, security, interoperability, and performance requirements have been met. Note: The User Acceptance period during project implementation is expected to last several months and will require complete cooperation from the West Virginia IIS staff. Delayed responses from the Agency will negatively impact delivery. Envision's goal is to meet or exceed our proposed go-live date, and we will need the Agency's cooperation to make that happen.

4.2.3.13.2.

Request:

4.2.3.13.2. Acceptance Testing: The Vendor must support and participate in Agency-led Acceptance Testing, which includes but is not limited to:

- 4.2.3.13.2.1.** Functional testing of all modules and workflows
- 4.2.3.13.2.2.** Data migration validation
- 4.2.3.13.2.3.** Interface and interoperability testing (e.g., HL7, FHIR, IIS-to-IIS, HIE, EHR connections)
- 4.2.3.13.2.4.** Performance and load testing
- 4.2.3.13.2.5.** Security and access control verification
- 4.2.3.13.2.6.** User acceptance testing (UAT) with Agency-designated staff

All defects identified during Acceptance Testing must be remediated by the Vendor at no additional cost to the Agency.

Response:

Envision will assist the Agency in performing Acceptance Testing prior to WebIZ go-live. It is anticipated that it will take several months for all requirements to be evaluated by the Agency. If defects are identified during Acceptance Testing, Envision agrees to work diligently to remediate them in a timely manner. If desired, Envision can provide User Acceptance test plans that have been previously executed by our existing WebIZ clients.

4.2.3.13.3.

Request:

4.2.3.13.3. Acceptance Criteria: The IIS solution will be deemed acceptable only when all of the following conditions have been met:

- 4.2.2.13.3.1.** All system functionality is fully implemented as described in the Vendor's approved Implementation Plan and the requirements of this Solicitation.
- 4.2.2.13.3.2.** All required interfaces are operational, exchanging data accurately and consistently with Agency-designated systems.
- 4.2.2.13.3.3.** All defects classified as Critical or High severity are resolved, and no Medium or Low defects materially impact system operation or Agency workflows.
- 4.2.2.13.3.4.** All documentation is delivered, including system architecture, configuration guides, user manuals, training materials, and administrative procedures.
- 4.2.2.13.3.5.** All security controls are implemented and validated, including authentication, authorization, audit logging, and compliance with Agency security standards.
- 4.2.2.13.3.6.** The system operates in the Agency's production environment without material errors for a mutually agreed-upon stabilization period (e.g., 30 days).
- 4.2.2.13.3.7.** The Vendor has met all contractual deliverables, including reporting, project management, and communication requirements

Response:

Envision will work tirelessly during the implementation phase of the project to assist the Agency in evaluating and making Acceptance decisions for all requirements outlined above. If defects are identified by the Agency, our team will expedite corrective actions to ensure the project remains on schedule. Our clients' satisfaction is of the utmost importance, and our team is committed to providing the Agency with a robust and stable IIS platform.

4.2.3.13.4.

Request:

4.2.3.13.4. Formal Acceptance: Upon successful completion of all Acceptance activities, the Agency will issue a written Notice of Acceptance. Only upon issuance of this Notice may the Vendor invoice for implementation-related fees. No annual, recurring, subscription, hosting, or maintenance fees may begin prior to Acceptance.

Response:

Prior to contract execution, Envision will provide the Agency with an implementation milestone schedule that aligns to the implementation plan in our bid. Detailed milestones, itemized fees, and the associated Agency acceptance criteria will be documented and agreed to by both parties. This collaborative invoice schedule can then be included in the contract.

During the implementation phase of the project, Envision will submit invoices as milestones have been accepted by the Agency. It is expected that Notice of Acceptance for the entirety of the WebIZ solution will be achieved prior to go-live.

4.2.3.13.5.

Request:

4.2.3.13.5. Rejection and Retesting: If the system fails to meet any Acceptance Criteria, the Agency will issue a Notice of Rejection identifying deficiencies. The Vendor must correct all deficiencies at no additional cost and resubmit the system for Acceptance Testing. The Agency reserves the right to repeat any portion of testing necessary to validate corrections.

Response:

Envision agrees to correct deficiencies for requirements set forth in the Agency's RFP. If the Agency submits a Notice of Rejection for any new or expanded requirement that was not clearly defined in the original RFP language, Envision will work with the Agency to determine the appropriate path forward. If an out-of-scope requirement is included in a Notice of Rejection, the Agency agrees that it will not negatively impact Envision's ability to receive a Notice of Acceptance for the fully implemented IIS solution. In addition, any delays caused by such requests will not apply to any liquidated damage claims against our firm.

4.2.3.13.6.

Request:

4.2.3.13.6. Prorated Annual Fees Post-Implementation: Upon the Agency's formal written Acceptance of the fully implemented IIS solution, the Vendor may invoice only for the prorated portion of the annual licensing, subscription, hosting, maintenance, or support fees corresponding to the remainder of the current contract year. Under no circumstances may the Vendor invoice for a full annual fee for a partial contract year. Proration shall be calculated based on the number of days remaining in the contract year following the date of Acceptance.

Response:

Post-Implementation Envision will submit monthly pro-rated maintenance and support invoices for the remainder of the current contract period.

4.2.3.13.7.

Request:

4.2.3.13.7. Annual Fee Billing Limits and Advance Billing Requirements: Following completion of the prorated billing period described in Section 4.2.3.13.6, the Vendor may invoice the Agency for no more than twelve (12) months of annual licensing, subscription, hosting, maintenance, or support fees for any given billing period. Under no circumstances shall the Vendor invoice the Agency for multiple years of annual fees in a single lump-sum invoice. Annual fees shall be billed only in advance for the upcoming twelve (12) month period, or, at the Vendor's option and subject to Agency approval, in quarterly installments billed in advance for the upcoming quarter. The Vendor shall not invoice for any period beyond the next twelve (12) months, nor for any period that has not yet commenced.

Response:

At the completion of the pro-rated billing period, Envision agrees to invoice the Agency for the annual maintenance and support fees associated with the next twelve (12) month contract period. Unless specifically requested by the Agency in writing, Envision agrees not to submit an invoice for more than one (1), twelve-month contract period at a time.

Section 4.3 Qualifications and Experience

Section 4.3.1 Qualifications and Experience Information

4.3.1.1.

Request:

4.3.1.1. Business: The Vendor should briefly describe the company's core business, background, and experience in providing IT solutions to government health and human services agencies.

Response:

With a corporate mission focused on *“The future of integrated public health intelligence”*, Envision is the market leader in providing immunization information systems (IIS) to public health agencies.

Our people come from all backgrounds and walks of life ranging from world class experts in epidemiology, informatics, and disease surveillance to engineers and product teams building high performance, modern solutions. Our culture is centered around teamwork, relentless focus on client outcomes, and individual accountability.

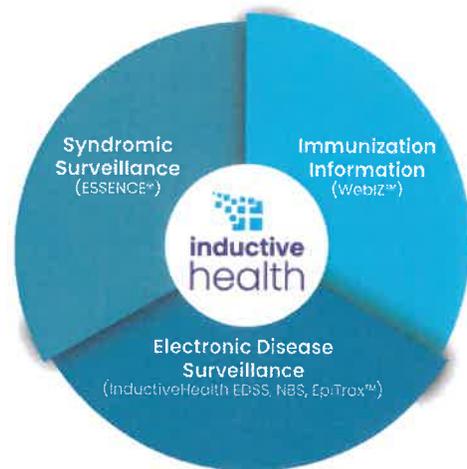
Company History:

For the past twenty-four (24) years, Envision Technology Partners, Inc. (Envision) has delivered high-quality IIS solutions through its nationally recognized IIS platform, WebIZ. In January 2025, Envision was acquired by InductiveHealth Informatics, LLC (InductiveHealth). InductiveHealth, which is headquartered in Atlanta, Georgia, is widely considered the leader in the Electronic Disease Surveillance and Syndromic Surveillance services industry.

The combined InductiveHealth-Envision organization currently supports more than forty (40) Federal, State, and Local Public Health agencies, and our team’s skill set, and capabilities have never been stronger.

Envision Technology Partners, Inc., has 24 years of IIS implementation experience as a leading developer of IIS software. In serving our corporate mission, our goal is to partner with all customers to meet their functional requirements, delivery dates, quality levels, and cost constraints. Working almost exclusively on IIS since 2001, Envision is poised to provide a cost-effective, state-of-the-art IIS application, hosted in the Azure Government Cloud. Envision currently provides IIS cloud hosting, maintenance & support, and enhancement services to twenty-one (21) of the CDC IIS awardee jurisdictions. The following outlines the jurisdictions government and health services agencies we are currently serving, including in parentheses, the year they went live with Envision’s WebIZ IIS.

- | | |
|---|---|
| American Samoa (2009) | Kansas (2005) |
| Arkansas (2012) | Kentucky (2015) |
| City of Philadelphia (2011) | Missouri (2020) |
| Commonwealth of the Northern Mariana Islands (2009) | Nevada (2003) |
| Connecticut (2018) | New Hampshire (2020) |
| Colorado (2010) | New Mexico (2016) |
| Delaware (2011) | Oklahoma (2020) |
| Federated States of Micronesia (2007) | Pennsylvania (2024) |
| Guam (2007) | Republic of the Marshall Islands (2009) |
| Hawaii (2025) | Republic of Palau (2007) |
| | South Carolina (2020) |



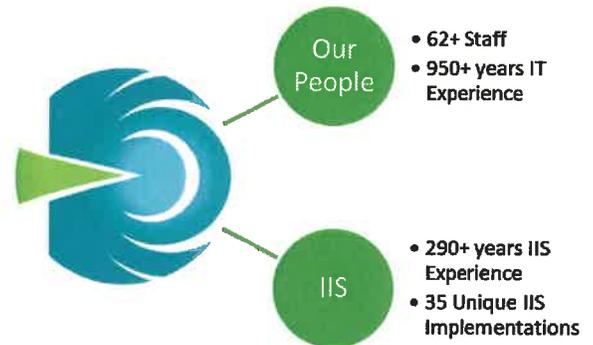
Across our “WebIZ Community” there is nearly ninety (90) million patients and over one (1) billion immunization records currently stored in our WebIZ IIS platform. This speaks volumes to the success of our IIS platform and Envision’s ability to successfully manage large-scale, public health data sets.

Our People:

The key to success with IIS is an organization focused on the advancement of IIS and experienced people. Envision provides deep expertise with both IIS implementations and the trends of the national community. Collectively our organization has:

- 390+ years of experience in Public Health
- 290+ years of experience with IIS
- Experience with 35 unique IIS implementations

Our focus on public health and the depth of our people set our company apart and positions us as a unique partner to successfully transition West Virginia to our state-of-the-art IIS application.



4.3.1.2.

Request:

4.3.1.2. Corporate Identity: The Vendor should provide the identity of any parent corporation, including address, phone and fax numbers, federal employer identification number (FEIN) or tax ID number, company website, and contact email. Provide the identity of any subsidiaries, as applicable.

Response:

Envision Technology Partners is a wholly owned subsidiary of InductiveHealth Informatics, LLC. Please find InductiveHealth Informatics, LLC’s information below:

- Address: 2870 Peachtree Rd NW #915-3304, Atlanta, GA 30305-2918
- Phone: 678-786-9260
- Fax: 800-991-2996
Please ensure that your faxes are addressed as "Attn: Your Name #3304"
- FEIN: 46-1190970

4.3.1.3.

Request:

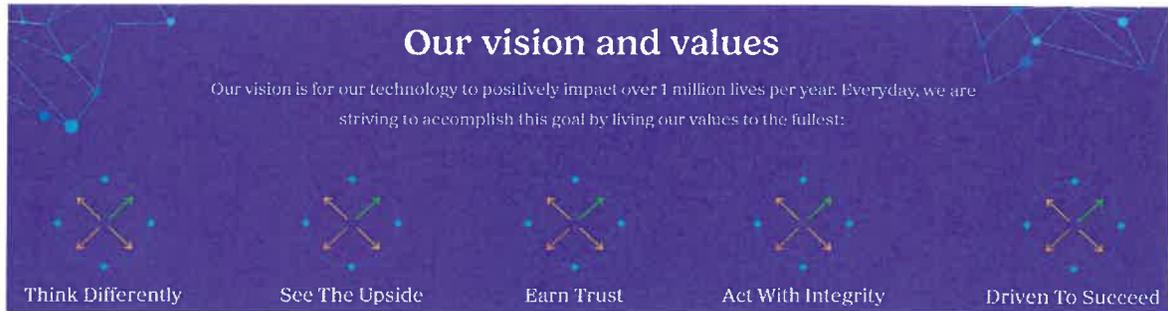
4.3.1.3. Organization and Structure: The Vendor should provide an overview of its organizational operating structure and describe the operational and functional relationships of the business units of its organization as they relate to the Vendor's proposal and the Agency's stated needs and requirements. Organizational charts are helpful supplements to the descriptions.

Response:

We are a public health company. We bring 176 staff with a corporate mission focused on “*The future of integrated public health intelligence*”. Our overall company operating structure relating to our West Virginia IIS proposal includes:

Executive Team:

Responsible for our public health organization, engagement with the market, and enabling our teams to deliver a standard of excellence to our public health clients. In this contract we will be available and engage with West Virginia staff and leadership to ensure we deliver timely, with quality, and able to work collaboratively to adjust to the changing landscape of public health. We work collaboratively as a team across the organization to ensure that each client is receiving our very best and experiencing our vision and values which are:



Client Operations:

This area of our organization has key responsibilities for ongoing delivery and implementation throughout our organization with key areas including:

- Project Management Office (PMO) – will have ongoing oversight of the implementation phase of the project for an on-time and on-budget delivery including deliverable acceptance.
- Delivery – Will have responsibility for:
 - Leading configuration of West Virginia’s WebIZ instance
 - Oversight of data migration activities
 - Ongoing delivery of maintenance and support activities to ensure compliance with SLAs
- Integration and Onboarding – Responsibility for supporting West Virginia in re-onboarding of HL7 v2.5.1 providers to WebIZ as well as all other interfaces to WebIZ such as WVHIN and other interfaces.
- Help Desk – Responsibility in maintenance and operations to collaboratively support West Virginia in the combined Tier 1/Tier 2/Tier 3 support model developing the final structure collaboratively with the State.

Client Success:

This organization will have responsibility for overseeing training for West Virginia staff and supporting West Virginia staff through acceptance activities of the system. This organization will also provide a Client Success Manager for the life of the contract that will be the primary engagement point for West Virginia for all contractual support provided.

Product:

The product organization is responsible for our overall product roadmap and that WebIZ remains aligned with changing CDC IIS Functional standards, AIRA’s measurement and improvement activities, and West Virginia policy. In addition, this organization is responsible for:

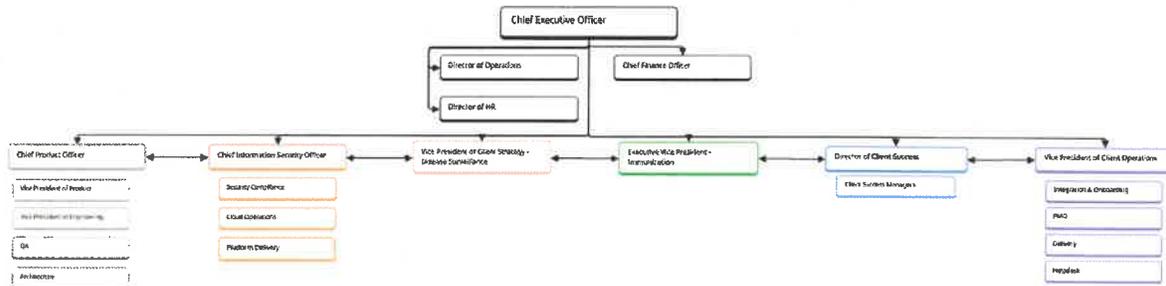
- QA – Providing all testing and quality activities for WebIZ releases including providing supporting user acceptance test cases for our clients to leverage and/or build off for their acceptance activities.
- Architecture – Continued modernization of our development tools and architecture so that WebIZ remains a modern platform.

Security:

Provides our security training, monitoring and response for all our clients, including:

- Security Compliance – Running our security program including training and monitoring of staff for compliance, vulnerability scanning, penetration testing, and third-party audit support for SOC2.
- Cloud Operations – Responsible for ongoing health and patching of the Azure Government Cloud tenant for the WV instance of WebIZ including annual Disaster Recovery exercises.

The following organizational chart provides a visual of how these areas fit together.



4.3.1.4.

Request:

4.3.1.4. Locations: The Vendor should describe the geographical locations of their firm at the national, regional, and local levels, as applicable. Identify all locations that will be used to support a resultant contract and the operations managed from these locations. Clearly identify any overseas locations which may be used to support the resultant contract. No State or Federal data may be stored on servers or systems outside of the United States of America (U.S.), including U.S. Territories.

Response:

We are a US based company with office locations at:

InductiveHealth-Envision (Headquarters)

2870 Peachtree Rd NW #915-3304
Atlanta, GA 30305-2918

InductiveHealth-Envision (Satellite Office)

7995 East Prentice Avenue, Suite 305-E
Greenwood Village, CO 80111

4.3.1.5.

Request:

4.3.1.5. References: The Vendor should provide three (3) references from system implementation projects or systems in operations within the last five (5) years that demonstrate the Vendor's ability to achieve the goals and objectives in Section 4.2 and meet the requirements in the RFP.

Vendors may provide only one (1) reference per project performed and should include details about the Project such as project goals and objectives, general functionality, implementation timeline, and length of time the system has been in operation if applicable.

Response:

Envision's three (3) references are:

- Kentucky
- Delaware
- Hawaii

All of these references are for IIS specific projects with common attributes being:

- Actively using state-configured instances of WebIZ in Microsoft Azure Government Cloud to what is proposed for West Virginia.
- Actively in production and receiving similar support and maintenance services as required in this RFP.

The following provides additional details on each project:

Kentucky Immunization Registry, (KYIR)

Trusted Public Health Partner Since 2015. The Kentucky Immunization Program has been a highly respected and long-standing partner of Envision since 2014 with their KY version of WebIZ, known as KYIR, going live in 2015. Together, Envision and Kentucky have collaborated to advance strategic modernization initiatives for the state's Immunization Information System (IIS)—strengthening public health outcomes and better serving communities across the Commonwealth.



Kentucky also utilizes the Kentucky Health Information Exchange (KHIE) as the Commonwealth's statewide, secure health information exchange operated by the Kentucky Cabinet for Health and Family Services (CHFS). KHIE connects all Kentucky acute care hospitals and thousands of ambulatory care locations, creating a common infrastructure for exchanging clinical data such as laboratory results, immunizations, summaries of care, admit/discharge/transfer (ADT) notifications, behavioral health data, EMS data, and select correctional health information. As Kentucky's designated public health reporting authority, KHIE also serves as the gateway for electronic reporting to public health programs, including immunizations, syndromic surveillance, reportable laboratory results, and case reporting, while supporting federal Promoting Interoperability requirements.

Kentucky's leadership, vision, and commitment to innovation have made them an exceptional partner. Their continued investment in modernization has helped create a more secure, accessible, and data-driven IIS—positioning the state to better support public health initiatives today and into the future. The following are some key initiatives we have partnered with KY on in the past five (5) years.

Driving Modernization for Public Health Impact:

Over the past several years, Kentucky and Envision have worked side by side on critical initiatives designed to modernize the IIS, improve data quality and accessibility, and ensure the system meets evolving regulatory, accessibility, and user needs. These efforts directly support healthcare providers, public health officials, and the populations they serve.

Key Modernization Initiatives:

1. **Data Access & Reporting Enhancements** - Kentucky has been instrumental in funding and supporting multiple initiatives that significantly improve access to immunization data for program administrators and clinic users, including:
 - a. Development of a **new SQL endpoint** leveraging a **purpose-built immunization data schema**
 - b. Creation of **automated data quality reports** to ensure high-quality HL7 data submissions
 - c. Ongoing enhancements to **Power BI dashboards and reporting tools**, enabling users to access actionable information more easily and efficiently
2. **Section 508 Accessibility Compliance** - Through a focused modernization effort, Kentucky and Envision are streamlining **508 compliance** across the IIS, delivering long-term benefits such as:
 - a. A more maintainable and future-ready codebase
 - b. Improved application performance and strengthened security
 - c. A consistent, accessible user experience for all IIS users
3. **School Certificate Logic Modernization** - Envision partnered with Kentucky to implement **configurable school certificate logic**, aligned with Kentucky state regulations. This enhancement allows patients and families to efficiently obtain **School Certificates of Immunization**, reducing administrative burden while ensuring compliance with state requirements.

Kentucky Program Contact Information:

Laura Barrett – Kentucky Immunization Registry Manager - laurae.barrett@ky.gov - 502-564-0038

Delaware Immunization Registry, (DelVAX)

Delaware has been a valued client of Envision since 2011. Over the course of this long-standing partnership, Envision has provided ongoing technical, operational, and strategic support to strengthen and enhance Delaware’s immunization program infrastructure to achieve Delaware’s immunization goals of immunizations are for people of all ages. From newborns to senior citizens, timely immunizations are one of the most important ways for people to protect themselves and others from serious diseases. Adults, adolescents, children, and infants need to stay up-to-date with the vaccinations that are recommended for their ages. The Division of Public Health Immunization Program’s goal is to prevent vaccine-preventable diseases by making sure children and adults receive the vaccines they need. The program assures:



- All citizens of Delaware have access to vaccines;
- Healthcare providers are aware of immunization standards of practice;
- The latest recommendations on vaccines are available to providers; and
- Providers and the public have access to up-to-date answers to vaccine questions

Mission Statement:

The mission of the Delaware Immunization Program is to prevent and control the transmission of vaccine

preventable diseases through the support and implementation of interventions aimed at increasing immunization rates.

Envision’s current support model emphasizes collaboration, transparency, and continuous improvement compliments and supports Delaware’s immunization program goals. Delaware participates in our weekly community calls alongside other jurisdictions, benefiting from a shared learning environment that promotes collaboration with both our Envision team and peer jurisdictions. This community-based approach maximizes funding opportunities, drives functional enhancements, and ensures alignment with industry best practices.

To maintain consistent progress and visibility, Delaware’s Client Success Manager (CSM), conducts Biweekly Status Calls supported by detailed Status Reports outlining current initiatives, milestones, and priorities. Delaware also benefits from Envision’s monthly WebIZ releases, which deliver updated functionality aligned with the planned and projected WebIZ Roadmap. In addition, Delaware receives rapid response to tickets, technical issues, and programmatic questions to ensure minimal disruption to operations.

Envision works closely with Delaware to develop establish roadmap for new system enhancements and new functionality, helping guide funding allocation decisions that best support departmental and programmatic goals. Our team also provides IISAR assistance, fulfills ad hoc data requests, and conducts training and system demonstrations upon request to ensure staff are fully supported and informed of Web IZ functionality.

In 2025 we supported Delaware in two major program wide initiatives:

- **School Roster Project** – Enhanced interoperability between the IIS and the Delaware Department of Education (DOE), improving data exchange and program efficiency.
- **Master Client Index (MCI) Cutover Initiative** – Supported the statewide transition to the MCI, a system that assigns unique identifiers to patients to streamline service coordination and improve data integrity across departments.

Through ongoing collaboration, responsive support, and strategic system enhancements, we continue to partner with Delaware to strengthen its immunization infrastructure and advance public health outcomes.

Delaware Program Contacts:

Davia McCoy, Program Manager – 1-302-622-4154; davia.mckoy@delaware.gov
 Torane Hull, CDC Advisor – 1-302-802-5152; torane.hull@delaware.gov
 Carly Horton, Management Analyst – 1-302-802-5137; carly.horton@delaware.gov

Hawaii State Immunization System (HiSIS)

Hawaii State Department of Health has been a valued Envision partner since commencing system migration to WebIZ in July 2024, launching the Hawaii State Immunization System (HiSIS) in under one year through a disciplined, highly collaborative implementation.



- Following an August 2024 kickoff, the State and Envision executed a structured project plan that culminated in a successful Go-Live on June 16, 2025.
- A comprehensive 60-day Hypercare period (June–August 2025) included onsite support, daily operational meetings, elevated Tier II/III support and HL7 onboarding assistance, and proactive system monitoring—ensuring rapid stabilization and a smooth transition to Maintenance and Operations.

Hawaii's ability to move from contract execution to full implementation in less than 12 months demonstrates strong executive sponsorship, engaged program leadership, and a clear commitment to modernization—paired with a trusted, hands-on partnership with Envision that prioritized transparency, shared accountability, and long-term success beyond Go-Live.

Hawaii's Immunization Branch works to protect Hawaii's people from vaccine-preventable diseases (VPDs) through immunization.

The main activities of this Branch are to:

- Promote immunizations in accordance with Centers for Disease Control and Prevention (CDC) recommendations
- Manage the Vaccines for Children program, which provides federally purchased vaccines for administration to eligible children without cost
- Conduct investigations and surveillance of VPDs in Hawaii
- Oversee the Hawaii Immunization Registry, a secure web-based state-wide immunization information system capable of establishing and maintaining lifespan vaccination records for Hawaii's population
- Monitor compliance with State immunization requirements for public and private school attendance
- Assess immunization coverage levels in the community
- Develop collaborations and partnerships to reach under-immunized populations

Today, Hawaii operates on Envision's WebIZ platform with a mature operational model that includes monthly product releases (with 10,000+ regression test cases and 16,000+ nightly automated integration tests), Vaccine CDSi updates, security monitoring, SLA reporting, Azure Government environment management, and ongoing technical maintenance supporting Hawaii's Immunization Branch activities. The State is supported by dedicated client engagement leadership and direct access to subject matter experts, ensuring roadmap alignment, enhancement planning, and responsive support. For jurisdictions like West Virginia seeking a proven partner capable of delivering both accelerated implementation and long-term operational stability, Hawaii offers a compelling example of what strong collaboration, disciplined execution, and sustained operational support can achieve.

Hawaii Program Contact Information:

Ron Balajadia, Immunization Branch Chief

Ronald.Balajadia@doh.hawaii.gov

(808) 586-8328

Section 4.3.2. Mandatory Qualification/Experience Requirements

4.3.2.1

Request:

4.3.2.1. The Vendor must demonstrate organizational experience with Immunization Information Systems (IIS) or similar large-scale public health data systems in enterprise healthcare or public health settings, in compliance with all federal and state regulations within the five (5) years prior to this bid opening. Vendors may use one (1) or more of the references provided in response to Section 4.3.1.5. To satisfy this requirement.

Response:

Envision exceeds this mandatory requirement. We have over 24 years of IIS implementation and support experience across 21 unique public health settings, (year) indicates when they went live with WebIZ with continuous support through current including:

- ✓ American Samoa (2009)
- ✓ Arkansas (2012)
- ✓ City of Philadelphia (2011)
- ✓ Commonwealth of the Northern Mariana Islands (2009)
- ✓ Connecticut (2018)
- ✓ Colorado (2010)
- ✓ Delaware (2011)
- ✓ Federated States of Micronesia (2007)
- ✓ Guam (2007)
- ✓ Hawaii (2025)
- ✓ Kansas (2005)
- ✓ Kentucky (2015)
- ✓ Missouri (2020)
- ✓ Nevada (2003)
- ✓ New Hampshire (2020)
- ✓ New Mexico (2016)
- ✓ Oklahoma (2020)
- ✓ Pennsylvania (2024)
- ✓ Republic of the Marshall Islands (2009)
- ✓ Republic of Palau (2007)
- ✓ South Carolina (2020)

Attachment 1: Project Schedule

ID	Task Name	Duration	Start	Finish	Predecessors
1	West Virginia IIS Implementation Project Schedule (DRAFT)	406 days	Tue 2/24/26	Tue 9/14/27	
2	PROJECT INITATION AND GOVERNANCE	25 days	Wed 7/1/26	Tue 8/4/26	
3	Contract Execution and Project Initiation	10 days	Wed 7/1/26	Tue 7/14/26	
4	<i>Contract Execution</i>	<i>0 days</i>	<i>Wed 7/1/26</i>	<i>Wed 7/1/26</i>	
5	Baseline Project Schedule Established	10 days	Wed 7/1/26	Tue 7/14/26	4
6	Initial System Configuration Session	5 days	Wed 7/1/26	Tue 7/7/26	4
7	Joint Project Kick-Off Session	5 days	Wed 7/22/26	Tue 7/28/26	
8	Introduce Vendor and Jursidiction teams	1 day	Wed 7/22/26	Wed 7/22/26	5FS+5 days
9	Review objectives, implementation approach, and expectations	2 days	Thu 7/23/26	Fri 7/24/26	8
10	Present major phases, timeline, and implementation plan	2 days	Mon 7/27/26	Tue 7/28/26	9
11	System Configuration Sessions	2 days	Thu 7/23/26	Fri 7/24/26	8
12	Baseline Project Deliverables Established	5 days	Wed 7/29/26	Tue 8/4/26	
13	Identify required deliverables	2 days	Wed 7/29/26	Thu 7/30/26	10
14	Share templates for project documentation	1 day	Fri 7/31/26	Fri 7/31/26	13
15	Confirm project deliverable acceptance criteria	1 day	Mon 8/3/26	Mon 8/3/26	14
16	Establish Shared Collaboration Spaces	1 day	Tue 8/4/26	Tue 8/4/26	15
17	Establish Initial Project Meeting Cadence	5 days	Wed 7/29/26	Tue 8/4/26	
18	Define project manager sync schedule	1 day	Wed 7/29/26	Wed 7/29/26	10
19	Define working group meeting schedule and cadence	2 days	Thu 7/30/26	Fri 7/31/26	18
20	Define steering committee schedule and cadence	2 days	Mon 8/3/26	Tue 8/4/26	19
21	Create Project RAIDD Log	5 days	Wed 7/29/26	Tue 8/4/26	
22	Stand up RAIDD tracking tool	1 day	Wed 7/29/26	Wed 7/29/26	10
23	Conduct initial risk identification session	2 days	Thu 7/30/26	Fri 7/31/26	22
24	Establish RAIDD maintenance and escalation process	2 days	Mon 8/3/26	Tue 8/4/26	23
25	<i>Project Initiation and Governance Complete</i>	<i>0 days</i>	<i>Tue 8/4/26</i>	<i>Tue 8/4/26</i>	<i>7,12,17,21</i>
26	REQUIREMENTS VALIDATION AND CONFIGURATION	83 days	Wed 7/29/26	Fri 11/20/26	
27	Conduct Configuration JAD Sessions	17 days	Wed 7/29/26	Thu 8/20/26	
28	System Configuration Review Session #1	1 day	Wed 7/29/26	Wed 7/29/26	4FS+20 days
29	System Configuration Review Session #2	1 day	Thu 8/6/26	Thu 8/6/26	28FS+5 days
30	System Conifguration Review Session #3	2 days	Fri 8/14/26	Mon 8/17/26	29FS+5 days
31	Document decisions in Configuration Specification	2 days	Tue 8/18/26	Wed 8/19/26	30

ID	Task Name	Duration	Start	Finish	Predecessors
32	Validate decisions with Jurisdiction SMEs	1 day	Thu 8/20/26	Thu 8/20/26	31
33	Initial Application Build and Configuration	30 days	Fri 8/21/26	Thu 10/1/26	
34	Envision updates system parameter values in preparation for environment	10 days	Fri 8/21/26	Thu 9/3/26	32
35	Validate parameter changes in internal DEV environment	10 days	Fri 9/4/26	Thu 9/17/26	34
36	Prepare QA and TEST deployments	10 days	Fri 9/18/26	Thu 10/1/26	35
37	Deploy Configuration Across Environments	5 days	Fri 10/2/26	Thu 10/8/26	
38	Deploy configuration baseline to QA and TEST environments	5 days	Fri 10/2/26	Thu 10/8/26	36
39	Internal Testing of Configured Application	10 days	Fri 10/9/26	Thu 10/22/26	
40	Vendor tests configured WebIZ in internal DEV	5 days	Fri 10/9/26	Thu 10/15/26	38
41	Resolve configuration issues before QA and TEST releases	5 days	Fri 10/16/26	Thu 10/22/26	40
42	Release TEST Environment for Jurisdiction Review	6 days	Fri 10/23/26	Fri 10/30/26	
43	Provide Jurisdiction access to QA and TEST environments	1 day	Fri 10/23/26	Fri 10/23/26	41
44	Validate configuration behavior	5 days	Mon 10/26/26	Fri 10/30/26	43
45	Finalize Pre-Prod Configuration	15 days	Mon 11/2/26	Fri 11/20/26	
46	Apply final approved configuration to Pre-Prod	5 days	Mon 11/2/26	Fri 11/6/26	44
47	Validate Pre-Prod configuration	5 days	Mon 11/9/26	Fri 11/13/26	46
48	Envision provide Pre-Prod access to Jurisdiction for data review and appro	5 days	Mon 11/16/26	Fri 11/20/26	47
49	<i>Requirements Validation and Configuration Complete</i>	<i>0 days</i>	<i>Fri 11/20/26</i>	<i>Fri 11/20/26</i>	<i>45,42,39,37,33,21</i>
50	DATA MIGRATION	356 days	Tue 2/24/26	Tue 7/6/27	
51	Providers, Clinics, and HL7 Facilities Data Mapping	50 days	Wed 7/15/26	Tue 9/22/26	
52	Data Mapping Review Sessions Week 1 (2x per week)	5 days	Wed 7/15/26	Tue 7/21/26	4FS+9 days
53	Data Mapping Review Sessions Week 2 (2x per week)	5 days	Wed 7/22/26	Tue 7/28/26	52
54	Data Mapping Review Sessions Week 3 (2x per week)	5 days	Wed 7/29/26	Tue 8/4/26	53
55	Envision updates Providers and Clinics data migration container scripts	10 days	Wed 8/5/26	Tue 8/18/26	54
56	Jurisdiction provides export of Provider and Clinic data to Envision	10 days	Wed 8/5/26	Tue 8/18/26	54
57	Envision loads data into data validation spreadsheet	10 days	Wed 8/19/26	Tue 9/1/26	56,55
58	Joint spreadsheet data validation review	5 days	Wed 9/2/26	Tue 9/8/26	57
59	Envision documents changes and issues from data validation review	5 days	Wed 9/9/26	Tue 9/15/26	58
60	Envision prepares Provider and Clinic data for next iteration of data load	5 days	Wed 9/16/26	Tue 9/22/26	59
61	Schools and School Districts Data Mapping	55 days	Wed 8/5/26	Tue 10/20/26	
62	Data Mapping Review Sessions Week 1 (2x per week)	5 days	Wed 8/5/26	Tue 8/11/26	54

ID	Task Name	Duration	Start	Finish	Predecessors
63	Data Mapping Review Sessions Week 2 (2x per week)	5 days	Wed 8/12/26	Tue 8/18/26	62
64	Data Mapping Review Sessions Week 3 (2x per week)	5 days	Wed 8/19/26	Tue 8/25/26	63
65	Envision updates Schools and School Districts data migration container scr	10 days	Wed 8/26/26	Tue 9/8/26	64
66	Jurisdiction provides export of Schools and School Districts data to Envisio	10 days	Wed 8/26/26	Tue 9/8/26	64
67	Envision loads data into data validation spreadsheet	10 days	Wed 9/9/26	Tue 9/22/26	66,65
68	Joint spreadsheet data validation review	5 days	Wed 9/23/26	Tue 9/29/26	67
69	Envision implements changes from data validation review	10 days	Wed 9/30/26	Tue 10/13/26	68
70	Envision prepares Schools and School Districts data for Test Environment	5 days	Wed 10/14/26	Tue 10/20/26	69
71	Users Data Mapping	55 days	Wed 8/26/26	Tue 11/10/26	
72	Data Mapping Review Sessions Week 1 (2x per week)	5 days	Wed 8/26/26	Tue 9/1/26	64
73	Data Mapping Review Sessions Week 2 (2x per week)	5 days	Wed 9/2/26	Tue 9/8/26	72
74	Data Mapping Review Sessions Week 3 (2x per week)	5 days	Wed 9/9/26	Tue 9/15/26	73
75	Envision updates Users data migration container scripts	10 days	Wed 9/16/26	Tue 9/29/26	74
76	Jurisdiction provides export of Users data to Envision	10 days	Wed 9/16/26	Tue 9/29/26	74
77	Envision loads data into data validation spreadsheet	10 days	Wed 9/30/26	Tue 10/13/26	75,76
78	Joint spreadsheet data validation review	5 days	Wed 10/14/26	Tue 10/20/26	77
79	Envision implements changes from data validation review	10 days	Wed 10/21/26	Tue 11/3/26	78
80	Envision prepares Users data for Test Environment load	5 days	Wed 11/4/26	Tue 11/10/26	79
81	Test and QA Environment Load #1: Providers, Clinics, HL7 Facilities, Users, S	10 days	Wed 11/11/26	Tue 11/24/26	51,61,71
82	Test and QA Data Load Complete	0 days	Tue 11/24/26	Tue 11/24/26	81
83	Patient Data Mapping	50 days	Wed 10/7/26	Tue 12/15/26	
84	Data Mapping Review Sessions Week 1 (2x per week)	5 days	Wed 10/7/26	Tue 10/13/26	74FS+15 days
85	Data Mapping Review Sessions Week 2 (2x per week)	5 days	Wed 10/14/26	Tue 10/20/26	84
86	Data Mapping Review Sessions Week 3 (2x per week)	5 days	Wed 10/21/26	Tue 10/27/26	85
87	Envision updates Patient data migration container scripts	10 days	Wed 10/28/26	Tue 11/10/26	86
88	Jurisdiction provides export of Patient data to Envision	10 days	Wed 10/28/26	Tue 11/10/26	86
89	Envision loads data into data validation spreadsheet	10 days	Wed 11/11/26	Tue 11/24/26	87,88
90	Joint spreadsheet data validation review	5 days	Wed 11/25/26	Tue 12/1/26	89
91	Envision implements changes from data validation review	5 days	Wed 12/2/26	Tue 12/8/26	90
92	Envision prepares Patient data for Pre-Prod Environment load	5 days	Wed 12/9/26	Tue 12/15/26	91
93	Vaccination Data Mapping	50 days	Wed 10/28/26	Tue 1/5/27	

ID	Task Name	Duration	Start	Finish	Predecessors
94	Data Mapping Review Sessions Week 1 (2x per week)	5 days	Wed 10/28/26	Tue 11/3/26	86
95	Data Mapping Review Sessions Week 2 (2x per week)	5 days	Wed 11/4/26	Tue 11/10/26	94
96	Data Mapping Review Sessions Week 3 (2x per week)	5 days	Wed 11/11/26	Tue 11/17/26	95
97	Envision updates Vaccination data migration container scripts	10 days	Wed 11/18/26	Tue 12/1/26	96
98	Jurisdiction provides export of Vaccination data to Envision	10 days	Wed 11/18/26	Tue 12/1/26	96
99	Envision loads data into data validation spreadsheet	10 days	Wed 12/2/26	Tue 12/15/26	97,98
100	Joint spreadsheet data validation review	5 days	Wed 12/16/26	Tue 12/22/26	99
101	Envision implements changes from data validation review	5 days	Wed 12/23/26	Tue 12/29/26	100
102	Envision prepares Vaccination data for Pre-Prod Environment load	5 days	Wed 12/30/26	Tue 1/5/27	101
103	Miscellaneous and Notes Data Mapping	50 days	Wed 11/18/26	Tue 1/26/27	
104	Data Mapping Review Sessions Week 1 (2x per week)	5 days	Wed 11/18/26	Tue 11/24/26	96
105	Data Mapping Review Sessions Week 2 (2x per week)	5 days	Wed 11/25/26	Tue 12/1/26	104
106	Data Mapping Review Sessions Week 3 (2x per week)	5 days	Wed 12/2/26	Tue 12/8/26	105
107	Envision updates Vaccination data migration container scripts	10 days	Wed 12/9/26	Tue 12/22/26	106
108	Jurisdiction provides export of Vaccination data to Envision	10 days	Wed 12/9/26	Tue 12/22/26	106
109	Envision loads data into data validation spreadsheet	10 days	Wed 12/23/26	Tue 1/5/27	107,108
110	Joint spreadsheet data validation review	5 days	Wed 1/6/27	Tue 1/12/27	109
111	Envision implements changes from data validation review	5 days	Wed 1/13/27	Tue 1/19/27	110
112	Envision prepares Vaccination data for Pre-Prod Environment load	5 days	Wed 1/20/27	Tue 1/26/27	111
113	Pre-Prod Data Load: Load All Mapped Data into Pre-Prod for Review	10 days	Wed 1/27/27	Tue 2/9/27	103,93,83
114	Initial Pre-Prod Data Load Complete	0 days	Tue 2/24/26	Tue 2/24/26	
115	Iterative Pre-Production Data Validation Loads	115 days	Wed 1/27/27	Tue 7/6/27	
116	Iterative Data Load #1	25 days	Wed 1/27/27	Tue 3/2/27	
117	Jurisdiction provide updated data export to Envision	5 days	Wed 1/27/27	Tue 2/2/27	103,93,83
118	Envision loads data into data validation spreadsheet	5 days	Wed 2/3/27	Tue 2/9/27	117
119	Joint spreadsheet data validation review	5 days	Wed 2/10/27	Tue 2/16/27	118
120	Envision loads updated data into Pre-Prod environment	5 days	Wed 2/17/27	Tue 2/23/27	119
121	Jurisdiction reviews updated data and provides feedback	5 days	Wed 2/24/27	Tue 3/2/27	120
122	Iterative Data Load #2	30 days	Wed 3/3/27	Tue 4/13/27	
123	Jurisdiction provide updated data export to Envision	5 days	Wed 3/3/27	Tue 3/9/27	121
124	Envision loads data into data validation spreadsheet	5 days	Wed 3/10/27	Tue 3/16/27	123

ID	Task Name	Duration	Start	Finish	Predecessors
125	Joint spreadsheet data validation review	5 days	Wed 3/17/27	Tue 3/23/27	124
126	Envision implements changes from data validation review	5 days	Wed 3/24/27	Tue 3/30/27	125
127	Envision loads updated data into Pre-Prod environment	5 days	Wed 3/31/27	Tue 4/6/27	126
128	Jurisdiction reviews updated data and provides feedback	5 days	Wed 4/7/27	Tue 4/13/27	127
129	Iterative Data Load #3	30 days	Wed 4/14/27	Tue 5/25/27	
130	Jurisdiction provide updated data export to Envision	5 days	Wed 4/14/27	Tue 4/20/27	128
131	Envision loads data into data validation spreadsheet	5 days	Wed 4/21/27	Tue 4/27/27	130
132	Joint spreadsheet data validation review	5 days	Wed 4/28/27	Tue 5/4/27	131
133	Envision implements changes from data validation review	5 days	Wed 5/5/27	Tue 5/11/27	132
134	Envision loads updated data into Pre-Prod environment	5 days	Wed 5/12/27	Tue 5/18/27	133
135	Jurisdiction reviews updated data and provides feedback	5 days	Wed 5/19/27	Tue 5/25/27	134
136	Iterative Data Load #4	30 days	Wed 5/26/27	Tue 7/6/27	
137	Jurisdiction provide updated data export to Envision	5 days	Wed 5/26/27	Tue 6/1/27	135
138	Envision loads data into data validation spreadsheet	5 days	Wed 6/2/27	Tue 6/8/27	137
139	Joint spreadsheet data validation review	5 days	Wed 6/9/27	Tue 6/15/27	138
140	Envision implements changes from data validation review	5 days	Wed 6/16/27	Tue 6/22/27	139
141	Envision loads updated data into Pre-Prod environment	5 days	Wed 6/23/27	Tue 6/29/27	140
142	Jurisdiction reviews updated data and provides feedback	5 days	Wed 6/30/27	Tue 7/6/27	141
143	<i>Data Migration Complete</i>	<i>0 days</i>	<i>Tue 7/6/27</i>	<i>Tue 7/6/27</i>	<i>136</i>
144	HL7 ONBOARDING AND INTERFACE CONFIGURATION	235 days	Wed 8/12/26	Tue 7/6/27	
145	HL7 Onboarding and Preparation	39 days	Wed 8/12/26	Mon 10/5/26	
146	Establish HL7 Onboarding Strategy	14 days	Wed 8/12/26	Mon 8/31/26	
147	Define HL7 onboarding approach for the Jurisdiction	5 days	Wed 8/12/26	Tue 8/18/26	4FS+30 days
148	Review current HL7 onboarding processes	2 days	Wed 8/19/26	Thu 8/20/26	147
149	Identify HL7 staffing roles & responsibilities	2 days	Fri 8/21/26	Mon 8/24/26	148
150	Provide HL7 documentation package (specifications, message guides, e)	5 days	Tue 8/25/26	Mon 8/31/26	149
151	Interface Inventory & Categorization	25 days	Tue 9/1/26	Mon 10/5/26	
152	Compile full list of current HL7 connections	10 days	Tue 9/1/26	Mon 9/14/26	150
153	Confirm EHR vendor contacts	10 days	Tue 9/15/26	Mon 9/28/26	152
154	Prioritize onboarding tiers (High volume → Low volume)	5 days	Tue 9/29/26	Mon 10/5/26	153
155	Interface Requirements & Design	56 days	Tue 10/6/26	Tue 12/22/26	

ID	Task Name	Duration	Start	Finish	Predecessors
156	Legacy Interface Review	15 days	Tue 10/6/26	Mon 10/26/26	
157	Review existing HL7 specifications used by the legacy system	5 days	Tue 10/6/26	Mon 10/12/26	154
158	Extract constraints, special handling, and known vendor deviations	5 days	Tue 10/13/26	Mon 10/19/26	157
159	Document required changes for migration to new HL7 engine	5 days	Tue 10/20/26	Mon 10/26/26	158
160	Review WebIZ Interface Requirements	20 days	Tue 10/27/26	Mon 11/23/26	
161	Provide HL7 v2.5.1 message structure requirements	5 days	Tue 10/27/26	Mon 11/2/26	159
162	Provide bi-directional (VXU/QBP) implementation guidance	5 days	Tue 11/3/26	Mon 11/9/26	161
163	Provide requirements for non-HL7 flat-file imports	5 days	Tue 11/10/26	Mon 11/16/26	162
164	Identify testing requirements for each interface type	5 days	Tue 11/17/26	Mon 11/23/26	163
165	Vendor Interface Sessions	21 days	Tue 11/24/26	Tue 12/22/26	
166	Facilitate interface review sessions with EHR vendors	10 days	Tue 11/24/26	Mon 12/7/26	164
167	Review vendor-specific HL7 behaviors	5 days	Tue 12/8/26	Mon 12/14/26	166
168	Confirm routing details, transport method, and security configuration	5 days	Tue 12/15/26	Mon 12/21/26	167
169	Document any additional non-HL7 interface requirements	1 day	Tue 12/22/26	Tue 12/22/26	168
170	Training for Jurisdiction HL7 Onboarding Staff	15 days	Wed 12/23/26	Tue 1/12/27	
171	Train Jurisdiction onboarding staff on WebIZ HL7 admin tools	5 days	Wed 12/23/26	Tue 12/29/26	169
172	Train on message processing, validation, and logs	5 days	Wed 12/23/26	Tue 12/29/26	169
173	Train on HL7 data quality review processes	5 days	Wed 12/30/26	Tue 1/5/27	172
174	Provide test scenarios and troubleshooting workflows	5 days	Wed 1/6/27	Tue 1/12/27	173
175	Interface Testing & Validation	71 days	Wed 1/13/27	Wed 4/21/27	
176	Vendor Onboarding Kickoff	20 days	Wed 1/13/27	Tue 2/9/27	
177	Notify vendors of onboarding schedule	10 days	Wed 1/13/27	Tue 1/26/27	174
178	Provide test plans, connection instructions, and endpoints	5 days	Wed 1/27/27	Tue 2/2/27	177
179	Provide support for initial connectivity troubleshooting	5 days	Wed 2/3/27	Tue 2/9/27	178
180	Connectivity Testing	25 days	Wed 2/10/27	Tue 3/16/27	
181	Vendors submit connection tests	10 days	Wed 2/10/27	Tue 2/23/27	179
182	Jurisdiction validates receipt	5 days	Wed 2/24/27	Tue 3/2/27	181
183	Verify ACK/NAK behavior	5 days	Wed 3/3/27	Tue 3/9/27	182
184	Resolve connectivity issues	5 days	Wed 3/10/27	Tue 3/16/27	183
185	Message Content Testing	20 days	Wed 3/17/27	Tue 4/13/27	
186	Vendors submit structured VXU messages	10 days	Wed 3/17/27	Tue 3/30/27	184

ID	Task Name	Duration	Start	Finish	Predecessors
187	Jurisdiction reviews:	5 days	Wed 3/31/27	Tue 4/6/27	186
188	Required segments	5 days	Wed 4/7/27	Tue 4/13/27	
189	CVX/MVX correctness	5 days	Wed 4/7/27	Tue 4/13/27	187
190	Demographic accuracy	5 days	Wed 4/7/27	Tue 4/13/27	187
191	OBX segments	5 days	Wed 4/7/27	Tue 4/13/27	187
192	Vendor corrects errors	5 days	Wed 4/7/27	Tue 4/13/27	187
193	Validation & Approval	6 days	Wed 4/14/27	Wed 4/21/27	
194	Jurisdiction validates all test scenarios	5 days	Wed 4/14/27	Tue 4/20/27	192
195	Jurisdiction provides onboarding approval	1 day	Wed 4/21/27	Wed 4/21/27	194
196	Migration of HL7 Connections from Legacy to New IIS	54 days	Thu 4/22/27	Tue 7/6/27	
197	Cutover Planning	21 days	Thu 4/22/27	Thu 5/20/27	
198	Define cutover date for each vendor	2 days	Thu 4/22/27	Fri 4/23/27	195
199	Establish communication plan	2 days	Mon 4/26/27	Tue 4/27/27	198
200	Ensure downtime window (if any) is communicated	5 days	Wed 4/28/27	Tue 5/4/27	199
201	Validate configuration in new IIS is ready	5 days	Wed 5/5/27	Tue 5/11/27	200
202	Provide new endpoints, credentials, certificates	5 days	Wed 5/12/27	Tue 5/18/27	201
203	Provide contact information for cutover support	2 days	Wed 5/19/27	Thu 5/20/27	202
204	Execute HL7 Cutover	8 days	Fri 6/25/27	Tue 7/6/27	
205	Disable connection on legacy IIS	3 days	Fri 6/25/27	Tue 6/29/27	203FS+25 days
206	Enable new IIS connection	1 day	Wed 6/30/27	Wed 6/30/27	205
207	Confirm receipt of first messages	1 day	Thu 7/1/27	Thu 7/1/27	206
208	Monitor message queues for errors	1 day	Fri 7/2/27	Fri 7/2/27	207
209	Resolve issues in real-time during cutover window	2 days	Mon 7/5/27	Tue 7/6/27	208
210	Non-HL7 Interface Activities (If Applicable)	155 days	Wed 8/12/26	Tue 3/16/27	
211	Flat-File Interfaces	55 days	Wed 8/12/26	Tue 10/27/26	
212	Identify non-HL7 providers	10 days	Wed 8/12/26	Tue 8/25/26	4FS+30 days
213	Review flat-file import format	5 days	Wed 8/26/26	Tue 9/1/26	212
214	Configure SFTP or import automation	20 days	Wed 9/2/26	Tue 9/29/26	213
215	Test flat-file uploads	10 days	Wed 9/30/26	Tue 10/13/26	214
216	Validate import and data mapping	10 days	Wed 10/14/26	Tue 10/27/26	215
217	VTrckS Interface	35 days	Wed 1/27/27	Tue 3/16/27	

ID	Task Name	Duration	Start	Finish	Predecessors
218	Review immunization ordering/exchange setup	10 days	Wed 1/27/27	Tue 2/9/27	4FS+150 days
219	Validate inbound/outbound messages to VTrckS	10 days	Wed 2/10/27	Tue 2/23/27	218
220	Resolve data structure mismatches	10 days	Wed 2/24/27	Tue 3/9/27	219
221	Approve VTrckS interface configuration	5 days	Wed 3/10/27	Tue 3/16/27	220
222	Other External Interfaces	10 days	Wed 9/23/26	Tue 10/6/26	
223	Vital Records	10 days	Wed 9/23/26	Tue 10/6/26	4FS+60 days
224	SSO/Identity provider	10 days	Wed 9/23/26	Tue 10/6/26	4FS+60 days
225	HIE connections	10 days	Wed 9/23/26	Tue 10/6/26	4FS+60 days
226	<i>HL7 Onboarding and Interface Configuration Complete</i>	<i>0 days</i>	<i>Tue 7/6/27</i>	<i>Tue 7/6/27</i>	<i>145,155,170,175,</i>
227	TESTING & QUALITY ASSURANCE	110 days	Wed 1/27/27	Tue 6/29/27	
228	Test Planning	20 days	Wed 1/27/27	Tue 2/23/27	
229	Create Comprehensive Test Plan for unit, integration, regression and relea	20 days	Wed 1/27/27	Tue 2/23/27	4FS+150 days
230	Define roles, responsibilities, test environments	10 days	Wed 1/27/27	Tue 2/9/27	4FS+150 days
231	Final Configurations & Workflow Simulations	50 days	Wed 2/24/27	Tue 5/4/27	
232	Validate all configuration decisions in Jurisdiction's WebIZ instance	20 days	Wed 2/24/27	Tue 3/23/27	228
233	Perform final workflow testing and simulations	30 days	Wed 3/24/27	Tue 5/4/27	232
234	Final QA & Operational Readiness	40 days	Wed 5/5/27	Tue 6/29/27	
235	Confirm no critical or high defects remain	10 days	Wed 5/5/27	Tue 5/18/27	231
236	Ensure performance, functional, and security requirements are met	15 days	Wed 5/19/27	Tue 6/8/27	235
237	Execute Operational Readiness Testing (ORT)	10 days	Wed 6/9/27	Tue 6/22/27	236
238	Go/No-Go readiness	2 days	Wed 6/23/27	Thu 6/24/27	237
239	Cutover/rollback preparedness	3 days	Fri 6/25/27	Tue 6/29/27	238
240	Help Desk readiness	3 days	Fri 6/25/27	Tue 6/29/27	238
241	<i>Testing and Quality Assurance Complete</i>	<i>0 days</i>	<i>Tue 6/29/27</i>	<i>Tue 6/29/27</i>	<i>228,231,234</i>
242	USER ACCEPTANCE TESTING (UAT)	95 days	Wed 2/10/27	Tue 6/22/27	
243	UAT Preparation	35 days	Wed 2/10/27	Tue 3/30/27	
244	Deliver UAT Plan (scenarios, test scripts, expected results)	15 days	Wed 2/10/27	Tue 3/2/27	4FS+160 days
245	Provide UAT environment, credentials, and test data	5 days	Wed 3/3/27	Tue 3/9/27	244
246	Conduct UAT Kick-Off Meeting	5 days	Wed 3/10/27	Tue 3/16/27	245
247	Train Jurisdiction SMEs on UAT process	10 days	Wed 3/17/27	Tue 3/30/27	246
248	UAT Execution	40 days	Wed 3/31/27	Tue 5/25/27	

ID	Task Name	Duration	Start	Finish	Predecessors
249	Jurisdiction SMEs perform scenario-based testing	10 days	Wed 3/31/27	Tue 4/13/27	243
250	Validate business workflows and requirements	5 days	Wed 4/14/27	Tue 4/20/27	249
251	Weekly UAT meetings to review defects & progress	5 days	Wed 4/21/27	Tue 4/27/27	250
252	Envision logs, tracks, and resolves issues	10 days	Wed 4/28/27	Tue 5/11/27	251
253	Regression testing cycles	10 days	Wed 5/12/27	Tue 5/25/27	252
254	UAT Completion	20 days	Wed 5/26/27	Tue 6/22/27	
255	All high/critical defects resolved or approved	10 days	Wed 5/26/27	Tue 6/8/27	248
256	UAT acceptance provided by Jurisdiction	5 days	Wed 6/9/27	Tue 6/15/27	255
257	Approval to move forward to Go-Live	5 days	Wed 6/16/27	Tue 6/22/27	256
258	UAT Complete	0 days	Tue 6/22/27	Tue 6/22/27	243,248,254
259	TRAINING	160 days	Wed 11/18/26	Tue 6/29/27	
260	Training Preparation	30 days	Wed 11/18/26	Tue 12/29/26	
261	Prepare and provide written Training Plan	20 days	Wed 11/18/26	Tue 12/15/26	4FS+100 days
262	Provide written user guides	5 days	Wed 12/16/26	Tue 12/22/26	261
263	Establish training/office hours schedule	5 days	Wed 12/23/26	Tue 12/29/26	262
264	Super User & Advanced Training	50 days	Wed 1/27/27	Tue 4/6/27	
265	Conduct Super User Training	20 days	Wed 1/27/27	Tue 2/23/27	260FS+20 days
266	Provide administrative-level training on advanced modules	15 days	Wed 2/24/27	Tue 3/16/27	265
267	Supply updated training materials	15 days	Wed 3/17/27	Tue 4/6/27	266
268	Train-the-Trainer	35 days	Wed 4/7/27	Tue 5/25/27	
269	Train Jurisdiction staff who will train end-users	15 days	Wed 4/7/27	Tue 4/27/27	264
270	Review training plans, materials, and delivery methods	10 days	Wed 4/28/27	Tue 5/11/27	269
271	Jurisdiction trainers begin preparing end-user sessions	10 days	Wed 5/12/27	Tue 5/25/27	270
272	Final End-User Preparation	25 days	Wed 5/26/27	Tue 6/29/27	
273	Trainers deliver Jurisdiction-led end-user training	10 days	Wed 5/26/27	Tue 6/8/27	268
274	Envision supports curriculum, Q&A, and recorded refreshers	5 days	Wed 6/9/27	Tue 6/15/27	273
275	Final training reinforcement before Go-Live	10 days	Wed 6/16/27	Tue 6/29/27	274
276	Training Complete	0 days	Tue 6/29/27	Tue 6/29/27	260,264,268,272
277	GO-LIVE READINESS	34 days	Wed 5/26/27	Mon 7/12/27	
278	Implementation Plan	25 days	Wed 5/26/27	Tue 6/29/27	
279	Develop Go-Live Implementation Plan	10 days	Wed 5/26/27	Tue 6/8/27	248

ID	Task Name	Duration	Start	Finish	Predecessors
280	Joint Review of Implementation Plan	5 days	Wed 6/9/27	Tue 6/15/27	279
281	Implementation Plan Updates	5 days	Wed 6/16/27	Tue 6/22/27	280
282	Final Review of Implementation Plan Prior to Go-Live	5 days	Wed 6/23/27	Tue 6/29/27	281
283	Go-Live Readiness	7 days	Fri 7/2/27	Mon 7/12/27	
284	Conduct Final Go/No-Go Readiness Review	5 days	Fri 7/2/27	Thu 7/8/27	242FS+7 days
285	Freeze Legacy IIS System for Final Data Extract	1 day	Fri 7/9/27	Fri 7/9/27	284
286	Execute Final Data Migration to New IIS	1 day	Mon 7/12/27	Mon 7/12/27	285,142
287	Disable HL7 Messaging to Legacy IIS	1 day	Fri 7/9/27	Fri 7/9/27	284
288	Cutover HL7 Endpoints to New IIS HL7 Engine	1 day	Mon 7/12/27	Mon 7/12/27	287
289	Redirect the Production URL to the New IIS	1 day	Fri 7/9/27	Fri 7/9/27	284
290	Send Go-Live Communication to Providers/Vendors	1 day	Fri 7/9/27	Fri 7/9/27	284
291	Deploy Vendor Team On-Site for Go-Live Support	1 day	Fri 7/9/27	Fri 7/9/27	284
292	WEST VIRGINIA WEB IZ GO-LIVE	0 days	Mon 7/12/27	Mon 7/12/27	277,2,26,144,227
293	POST-GO-LIVE STABILIZATION PERIOD	46 days	Tue 7/13/27	Tue 9/14/27	
294	HL7 Monitoring & Alerting	5 days	Tue 7/13/27	Mon 7/19/27	
295	Monitor HL7 queues for delays or errors	5 days	Tue 7/13/27	Mon 7/19/27	292
296	Monitor high-volume senders for data quality issues	5 days	Tue 7/13/27	Mon 7/19/27	292
297	Advanced Jurisdiction Support	5 days	Tue 7/13/27	Mon 7/19/27	
298	Provide issue triage support	5 days	Tue 7/13/27	Mon 7/19/27	292
299	Address escalated HL7 errors (vendor-level)	5 days	Tue 7/13/27	Mon 7/19/27	292
300	Final Review & Transition to Operations	5 days	Tue 7/13/27	Mon 7/19/27	
301	Confirm all interfaces successfully migrated	5 days	Tue 7/13/27	Mon 7/19/27	292
302	Transfer ongoing support to O&M teams	5 days	Tue 7/13/27	Mon 7/19/27	292
303	Stabilization Period	46 days	Tue 7/13/27	Tue 9/14/27	
304	Begin 60-day stabilization period	46 days	Tue 7/13/27	Tue 9/14/27	292
305	<i>Stabilization Period Complete</i>	<i>0 days</i>	<i>Tue 9/14/27</i>	<i>Tue 9/14/27</i>	<i>303</i>
306	PROJECT DELIVERABLES	406 days	Tue 2/24/26	Tue 9/14/27	
307	DELIVERABLE 1: Baseline Project Plan and Schedule	0 days	Tue 7/14/26	Tue 7/14/26	5
308	DELIVERABLE 2: Join Project Kickoff Completed	0 days	Tue 7/28/26	Tue 7/28/26	7
309	DELIVERABLE 3: Project Governance and RAIDD Framework Established	0 days	Tue 8/4/26	Tue 8/4/26	25
310	DELIVERABLE 4: Initial TEST/QA Data Load Completed	0 days	Tue 11/24/26	Tue 11/24/26	82

ID	Task Name	Duration	Start	Finish	Predecessors
311	DELIVERABLE 5: Data Migration Fully Completed	0 days	Tue 7/6/27	Tue 7/6/27	143
312	DELIVERABLE 6: Initial Pre-Production Data Load & Validation Completed	0 days	Tue 2/24/26	Tue 2/24/26	114
313	DELIVERABLE 7: Application Environments Provisioned (DEV/TEST/PRE-PRC)	0 days	Fri 11/20/26	Fri 11/20/26	45
314	DELIVERABLE 8: Requirements and Configuration Specifications Approved	0 days	Fri 11/20/26	Fri 11/20/26	49
315	DELIVERABLE 9: HL7 Onboarding Documentation Package Delivered	0 days	Mon 8/31/26	Mon 8/31/26	150
316	DELIVERABLE 10: HL7 Interface Testing & Vendor Onboarding Approved	0 days	Wed 4/21/27	Wed 4/21/27	195
317	DELIVERABLE 11: Training Plan Delivered	0 days	Tue 12/15/26	Tue 12/15/26	261
318	DELIVERABLE 12: Comprehensive Test Plan Approved	0 days	Tue 2/23/27	Tue 2/23/27	228
319	DELIVERABLE 13: UAT Plan Delivered	0 days	Tue 3/2/27	Tue 3/2/27	244
320	DELIVERABLE 14: Go-Live Implementation & Cutover Plan Approved	0 days	Tue 6/29/27	Tue 6/29/27	278
321	DELIVERABLE 15: Production Go-Live Initiated	0 days	Fri 7/9/27	Fri 7/9/27	291
322	DELIVERABLE 16: Stabilization Period Completed	0 days	Tue 9/14/27	Tue 9/14/27	305

Attachment 2: Exceptions to RFP

Exceptions to RFP# MIS2600000001

Bidder Solicitation Question Form		
Name of Bidder: Envision Technology Partners		
RFP number: MIS2600000001		
Primary Contact: Savannah Baratta		
Email: contracts@inductivehealth.com		
Phone: (248) 631-6810		
#	Documentation Reference	Exception
1	Section 18, Funding	We request the following be added to the end of Section 18: 1. In the event funding is not appropriated, Vendor shall still be compensated for any work completed.
2	Section 36, Indemnification	We request the Section be updated to the following: 1. The Vendor Agrees to indemnify, defend and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any third-party claims or losses for services rendered negligently . . . in connection with the performance of the Contract; (2) . . . (REMAINDER UNCHANGED)
3	We request the following be added as Section 36.1, Limitation on Liability	1. Except in the event of death, tangible property damage caused by Vendor, or third party claims of intellectual property violations for the use of Vendor Services provided under this Agreement, in no event shall either party be liable to the other for any indirect, consequential, incidental, exemplary, special or punitive damages arising out of or related to this Agreement and the total liability of Vendor shall be limited to two (2) times the annual contract value of the Agreement.

Attachment 3: Bidder Binding Statement

REQUEST FOR PROPOSAL
CRFP MIS2600000001
Immunization Information System

Points Allocated to Cost Proposal is 30

Proposal 1: Step 1 – $\$1,000,000 / \$1,000,000 =$ Cost Score Percentage of 1 (100%)
Step 2 – $1 \times 30 =$ Total Cost Score of 30

Proposal 2: Step 1 – $\$1,000,000 / \$1,100,000 =$ Cost Score Percentage of 0.909091 (90.9091%)
Step 2 – $0.909091 \times 30 =$ Total Cost Score of 27.27273

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.

Envision Technology Partners, Inc., DBA Sage Pursuits, Inc.

(Company)

Savannah Baratta, Director of Operations

(Representative Name, Title)

(248) 631-6810 / 800-991-2996, Please ensure that your f axes are addressed as "Attn: Your Name #3304"

(Contact Phone/Fax Number)

3/19/2026

(Date)

Attachment 4: Addendum Acknowledgement Form

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP MIS260000001

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

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

Envision Technology Partners, Inc., DBA Sage Pursuits, Inc.

Company

Savannah Baratta

Authorized Signature

3/19/2026

Date

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

IIS Baseline Requirements RTM

Response to: State of West Virginia's RFP # CRFP
0506 MIS2600000001

Produced by: Envision Technology Partners, Inc.

Function: Administer System		Return to Cover Page		
Capability	Requirement: The IIS must/should...	Priority: E, O	Vendor response: Yes, Yes	Vendor comment(s)
Hierarchy Configuration	ability to establish the IIS hierarchy to associate and manage relationships between entities	E	Yes	
Hierarchy Configuration	ability to associate user(s) to a facility	E	Yes	
Hierarchy Configuration	ability to associate clinician(s) to a facility	E	Yes	
Hierarchy Configuration	ability to associate facility/facilities to an organization	E	Yes	
Hierarchy Configuration	ability to establish geographic jurisdictional hierarchy	E	Yes	WebIZ has the ability to establish geographic jurisdictional hierarchy to
Hierarchy Configuration	ability to aggregate data across user-defined hierarchies	E	Yes	
System Configuration	ability to maintain inventory availability in IIS visible to authorized users	E	Yes	
System Configuration	ability for jurisdictional admin to maintain separate VFC supplied inventory in the IIS	E	Yes	
System Configuration	ability for jurisdictional admin to maintain separate jurisdiction supplied inventory	E	Yes	
System Configuration	ability for jurisdictional admin to maintain separate private stock inventory	E	Yes	
System Configuration	ability for jurisdictional admin to manage code sets	E	Yes	
System Configuration	ability for jurisdictional admin to update NDC codes	E	Yes	
System Configuration	ability for jurisdictional admin to update CVX codes	E	Yes	
System Configuration	ability for jurisdictional admin to update MVX codes	E	Yes	
System Configuration	ability to configure default values to minimize data input	E	Yes	
System Configuration	ability to display an error message in the user interface when minimum information required is not	E	Yes	
System Configuration	ability to standardize addresses per US Postal conventions and codes	E	Yes	
System Configuration	ability to verify validity of addresses (as valid USPS addresses) in the IIS through electronic means (e.g.,	E	Yes	
System Configuration	ability to geocode addresses	E	Yes	
System Configuration	ability to validate accurate assignment of address to an individual through electronic means (e.g.,	O	Yes	Envision has established a data exchange process with LexisNexis. The
System Configuration	ability for jurisdictional admin to modify facility types according to immunization program descriptions	E	Yes	
System Configuration	ability for jurisdictional admin to configure rules governing data validation of incoming HL7 messages	E	Yes	
System Configuration	ability to configure an authorization agreement as per jurisdictional policy	O	Yes	
System Configuration	ability to configure a user agreement as per jurisdictional policy	O	Yes	
System Configuration	ability to display age in year/month/day format in all age display fields (e.g., 2 years, 4 months, 3 days)	E	Yes	
System Configuration	ability to provide optional calendar to select a date in a web client	O	Yes	
System Configuration	ability to add patient priority group indicators	E	Yes	
System Configuration	ability to modify patient priority group indicators	E	Yes	
System Configuration	ability for jurisdictional admin to manage business rules related to data quality	E	Yes	

Function: Administer System		Return to Cover Page		
Capability	Requirement: The IIS must/should...	Priority: E, O	Vendor response: Yes, Yes	Vendor comment(s)
System Configuration	ability for jurisdictional admin to specify business rules for monitoring data quality	E	Yes	
System Configuration	ability for jurisdictional admin to modify business rules for monitoring data quality	E	Yes	
System Configuration	ability to configure the organization enrollment form	E	Yes	
System Configuration	support rules-based logic to suggest approval or rejection of enrollment form based on review of	E	Yes	
System Configuration	ability to manage rules-based logic for approval or rejection of enrollment form	E	Yes	
System Configuration	ability for jurisdictional admin to create enrollment forms based on program requirements	E	Yes	
System Configuration	ability for jurisdictional admin to modify an enrollment form	E	Yes	
System Configuration	ability to auto-populate existing user information in the IIS with the information on the enrollment form	O	Yes with customization*	A user submitting a new clinic registration form has the ability to include
System Configuration	ability to auto-populate the organization information in the IIS with information on the enrollment form	O	Yes	
System Configuration	ability for jurisdictional admin to configure vaccine forecasting business rules	E	Yes	WebiZ supports the configurable vaccine forecasting requirement with
System Configuration	ability to apply effective dates to vaccine rules	O	Yes	
System Configuration	ability to incorporate new vaccines per ACIP into the forecasting algorithm	E	Yes	
System Configuration	ability to support a record search algorithm to return "best matches"	E	Yes	
System Configuration	ability for jurisdictional admin to configure the number of search results to be displayed per	E	Yes	
System Configuration	ability for jurisdictional admin to modify required parameters for patient searches	E	Yes	
System Configuration	ability to restrict certain data from being included in reports such as sensitive demographic information	E	Yes	
System Configuration	ability to open multiple screens simultaneously within the application	O	Yes	
User Roles and Permissions	ability for jurisdictional admin to manage user roles and permissions by task per jurisdictional policy	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to add user roles with distinct permissions	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to modify user roles with distinct permissions	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to inactivate user roles	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to modify permissions to IIS processes and data for specific user roles	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to restrict system functionality by user role	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to restrict authorized user access to data based on user role	E	Yes	
User Roles and Permissions	ability for jurisdictional admin to enable access to standard reports based on user role	E	Yes	
User Roles and Permissions	ability to automatically update all users assigned to a role based on changes made to the "master" role	E	Yes with customization*	Envision has a project on the roadmap funded by other community
System Alerts	ability for jurisdictional admin to manage system alerts	E	Yes	
System Alerts	ability to view global messages upon logging into the application	E	Yes	
System Alerts	ability for jurisdictional admin to add system alerts for specific IIS users to view when logging into	O	Yes	
System Alerts	ability for jurisdictional admin to add global messages	E	Yes	
System Alerts	ability for jurisdictional admin to edit global messages	E	Yes	
System Alerts	ability for jurisdictional admin to inactivate global messages	E	Yes	

Function: Manage Organizations and Facilities		Return to Cover Page		
Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Organization/Facility Search	ability to search organization/facility information stored in the IIS	E	Yes	
Organization/Facility Search	ability for jurisdictional admin to search organizations/facilities by user-defined parameters	E	Yes	
Organization/Facility Search	ability to clear and re-enter search criteria when searching for an organization/facility	E	Yes	
Add, Edit, Inactivate Organization	ability for applicant from unauthorized (non-participating/enrolled) organization to enroll electronically for participation in the IIS	E	Yes	
Add, Edit, Inactivate Organization	ability for applicant from unauthorized organization to add IIS enrollment information online	E	Yes	
Add, Edit, Inactivate Organization	ability for applicant from unauthorized org to submit IIS enrollment information online	E	Yes	
Add, Edit, Inactivate Organization	ability for applicant from unauthorized org to save partially complete IIS enrollment information	O	Yes with customization*	Envision has project on the roadmap to create a feature that sends users, who are completing forms outside of the login, a link to return a partially saved or edit a rejected form. This feature will cover requirements in rows - 10, 11 and 15 on this tab. The anticipated cost of this enhancement is \$162,500 and would be completed by the WV go-live.
Add, Edit, Inactivate Organization	ability for applicant from unauthorized org to return to a partially complete IIS enrollment information	O	Yes with customization*	Envision has project on the roadmap to create a feature that sends users, who are completing forms outside of the login, a link to return a partially saved or edit a rejected form. This feature will cover requirements in rows - 10, 11 and 15 on this tab. The anticipated cost of this enhancement is \$162,500 and would be completed by the WV go-live.
Add, Edit, Inactivate Organization	ability to prevent submission of incomplete IIS enrollment information when required field(s) are missing	E	Yes	
Add, Edit, Inactivate Organization	ability to electronically notify the applicant of incomplete IIS enrollment information specifying the missing required fields	E	Yes	
Add, Edit, Inactivate Organization	ability to electronically notify applicant that IIS enrollment information has been submitted	E	Yes	A success message is presented to users when enrollment is submitted.
Add, Edit, Inactivate Organization	ability for applicant from unauthorized org to edit rejected IIS enrollment information	E	Yes with customization*	Envision has project on the roadmap to create a feature that sends users, who are completing forms outside of the login, a link to return a partially saved or edit a rejected form. This feature will cover requirements in rows - 10, 11 and 15 on this tab. The anticipated cost of this enhancement is \$162,500 and would be completed by the WV go-live.
Add, Edit, Inactivate Organization	ability for applicant from unauthorized org to resubmit a rejected IIS enrollment	E	Yes	
Add, Edit, Inactivate Organization	ability to capture electronic signature for enrollment, for an authorization agreement	O	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to manage organization/facility IIS enrollment	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to manage organization/facility IIS enrollment status	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to inactivate an organization	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to reactivate an organization	E	Yes	
Add, Edit, Inactivate Organization	ability to store IIS enrollment status for an organization/facility	E	Yes	

Function: Manage Organizations and Facilities		Return to Cover Page		
Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Add, Edit, Inactivate Organization	ability for jurisdictional admin to deactivate a facility	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to reactivate a facility	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to electronically approve IIS enrollment	E	Yes	
Add, Edit, Inactivate Organization	ability to include reason for rejecting IIS enrollment of an organization	E	Yes	
Add, Edit, Inactivate Organization	ability to electronically notify the organization that the submitted enrollment was rejected along with the reason	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to manage organization and facility records within the IIS	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to add an organization	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to modify an organization record	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to add a facility	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to modify a facility record	E	Yes	
Add, Edit, Inactivate Organization	ability to automatically generate unique facility IIS ID	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to associate a facility to an organization	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to edit association between a facility an organization	E	Yes	
Add, Edit, Inactivate Organization	ability to store multiple unique facility site IDs associated with a particular facility (to facilitate matching of facilities between the IIS and other data systems)	E	Yes	
Add, Edit, Inactivate Organization	ability to capture a facility's mailing address	E	Yes	
Add, Edit, Inactivate Organization	ability to capture a facility's shipping address	E	Yes	
Add, Edit, Inactivate Organization	ability to enter contact information for the facility contact	E	Yes	
Add, Edit, Inactivate Organization	ability to enter contact information for an optional contact	E	Yes	
Add, Edit, Inactivate Organization	ability to indicate if an organization/facility is a site where immunizations are administered	E	Yes	
Add, Edit, Inactivate Organization	ability to indicate if an organization/facility is a site where vaccines are stored for redistribution	O	Yes	
Add, Edit, Inactivate Organization	ability to save documents (i.e., enrollment/onboarding documents, storage and handling, borrowing, temperature logs, wastage, etc.) to specific organization/facility file folder per policy	E	Yes	
Add, Edit, Inactivate Organization	ability for jurisdictional admin to retrieve electronic files from provider file folder	E	Yes	WebIZ provides several options for associating electronic files with a provider or clinic. Examples include thermometer calibration certificates, temperature logs, staff training certificates, user confidentiality forms, and attaching documents to the News section.
Add, Edit, Inactivate Organization	ability for jurisdictional admin to record notes related to a organization/facility	E	Yes	
Add, Edit, Inactivate Organization	ability to flag an organization as participating in VFC and/or other user-defined vaccine program(s)	E	Yes	

Function: Manage Organizations and Facilities		Return to Cover Page		
Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Add, Edit, Inactivate Organization	ability to retrieve organization/facility information from scanned forms and automatically fill required data fields with retrieved information	O	Yes with customization*	OCR-based solutions can introduce quality and accuracy limitations. To avoid those challenges, WebIZ currently provides an electronic solution for collecting the information required to create a new Provider and/or Clinic. This information is gathered through a structured electronic submission process and does not require scanned forms for processing. The existing functionality allows users to complete predefined required data fields that form the basis of a Provider and Clinic record within the IIS. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
VFC/Vaccine Program Enrollment	ability for an organization to submit vaccine program enrollment information electronically	E	Yes	
VFC/Vaccine Program Enrollment	ability to capture electronic signature for vaccine program enrollment	E	Yes	
VFC/Vaccine Program Enrollment	ability to access the vaccine program agreement in a separate window from the vaccine program enrollment	E	Yes	
VFC/Vaccine Program Enrollment	ability to provide link to the blank formatted vaccine program enrollment form	E	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to assign a VFC pin number to a newly enrolled VFC site	E	Yes	
VFC/Vaccine Program Enrollment	ability to select the type of certified monitoring device being used to record temperatures	E	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to document that a facility has a certificate of calibration for the temperature monitoring device	O	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to approve a vaccine program enrollment	E	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to enter an expiration date for a vaccine program enrollment	E	Yes	Enrollment templates can be set to expire either 12 months or 24 months post approval.
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to document that the vaccine program facility has a routine and emergency vaccine management plan	E	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to document that a facility participating in VFC has a VFC Coordinator annual training certificate	E	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to document that a facility participating in VFC has a Backup Coordinator annual training certificate	E	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to add comments during the vaccine program enrollment approval process	O	Yes	
VFC/Vaccine Program Enrollment	ability to require the vaccine program facility to indicate the number of vaccine storage units being monitored	O	Yes	
VFC/Vaccine Program Enrollment	ability to require the vaccine program facility to indicate the types of vaccine storage units being monitored	O	Yes	
VFC/Vaccine Program Enrollment	ability to require the vaccine program facility to indicate whether they store Varicella and MMRV vaccine	E	Yes	
VFC/Vaccine Program Enrollment	ability to enter contact information for the facility Primary Vaccine Coordinator	E	Yes	
VFC/Vaccine Program Enrollment	ability to enter contact information for the facility Backup Vaccine Coordinator	E	Yes	
VFC/Vaccine Program Enrollment	ability to enter contact information for the facility vaccine program Agreement Signatory	E	Yes	

Function: Manage Organizations and Facilities		Return to Cover Page		
Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
VFC/Vaccine Program Enrollment	ability to capture the day of the week that a vaccine program facility may receive vaccine shipments	E	Yes	
VFC/Vaccine Program Enrollment	ability to capture the time that a vaccine program facility may receive vaccine shipments	E	Yes	
VFC/Vaccine Program Enrollment	ability to automatically turn off vaccine ordering capabilities for a facility that does not have an up-to-date vaccine program enrollment	E	Yes	
VFC/Vaccine Program Enrollment	ability to capture required information for VFC clinician: last name, first name, title, medical license number, NPI number, still active with facility, are they a signatory, specialty (FP, Peds) during the enrollment process	E	Yes	
VFC/Vaccine Program Enrollment	ability to attach VFC documentation (in multiple formats) such as: VFC training certification, certificate of calibration, medical license, floor design diagram and other documents	E	Yes	WebIZ provides several options for associating electronic files with a provider or clinic. Examples include thermometer calibration certificates, temperature logs, staff training certificates, user confidentiality forms, and attaching documents to the News section. If the State of West Virginia identifies additional use cases, we will work with you to incorporate them as needed.
VFC/Vaccine Program Enrollment	ability for IIS staff to retrieve electronic files from organization/facility file folder	O	Yes	WebIZ provides a secure method for file transfer. Files are stored in Azure Blob Storage, where administrators can securely retrieve them as needed. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
VFC/Vaccine Program Enrollment	ability to automatically validate clinician license number against Professional Licensing Agency record database	O	Yes	
VFC/Vaccine Program Enrollment	ability to submit vaccine program re-enrollment data electronically	E	Yes	
VFC/Vaccine Program Enrollment	ability to electronically notify a facility VFC/vaccine program coordinator of an upcoming need for VFC/vaccine program re-enrollment	O	Yes	
VFC/Vaccine Program Enrollment	ability for the jurisdictional vaccine program admin to modify the date for online renewal electronic notifications for each vaccine program facility	E	Yes	
VFC/Vaccine Program Enrollment	ability to suspend ordering capabilities for a facility pending approval of vaccine program enrollment	E	Yes	
VFC/Vaccine Program Enrollment	ability to re-activate ordering capabilities for a facility when a vaccine program enrollment is approved	E	Yes	
Organization/Facility Outreach	ability to send electronic communications to organization/facility contacts	E	Yes	
Organization/Facility Outreach	ability to send a final electronic notification reminder, re: renewal, to all VFC facilities that have not completed the renewal by their expiration date	E	Yes	
Organization/Facility Outreach	ability to send electronic communications directly from the IIS	O	Yes	
Organization/Facility Outreach	ability to send electronic communications directly from the IIS to multiple recipients	O	Yes	
Organization/Facility Outreach	ability to notify more than one user at a participating vaccine program facility of any vaccine program notification	O	Yes	
Organization/Facility Outreach	ability for the jurisdictional vaccine program admin to customize vaccine program enrollment alerts to participating vaccine program facilities when needed	O	Yes	The jurisdiction can customize when the participating facility receives the notification of their upcoming expiring enrollment.
Organization/Facility Outreach	ability for the jurisdictional vaccine program admin to modify the date for online renewal electronic notifications for each participating vaccine program facility	O	Yes	
Organization/Facility Outreach	ability to electronically notify the jurisdictional vaccine program admin of vaccine program follow-up activities for a new vaccine program facility enrolled for 6 months	O	Yes	

Function: Manage Users

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
User Search	ability for jurisdictional admin to search for user accounts by user-defined criteria	E	Yes	
User Search	ability for jurisdictional admin to view all user accounts	E	Yes	
User Search	ability for organization admin to search all user accounts associated with their organization	E	Yes	WebIZ provides a report for this data.
User Search	ability for organization admin to view all user accounts associated with their organization	E	Yes	
User Search	ability to sort users by user defined-criteria	O	Yes	WebIZ has the ability to pull and export Users reports into excel for sorting and filtering.
Add, Edit, Inactivate User	ability for admin to manage user accounts	E	Yes	
Add, Edit, Inactivate User	ability to track the progress of a new user registration	O	Yes	
Add, Edit, Inactivate User	ability for admin to add new users	E	Yes	
Add, Edit, Inactivate User	ability for admin to modify user accounts	E	Yes	
Add, Edit, Inactivate User	ability for admin to deactivate user accounts	E	Yes	
Add, Edit, Inactivate User	ability for jurisdictional admin to deactivate multiple accounts in one transaction	O	Yes	
Add, Edit, Inactivate User	ability for organization admin to deactivate user accounts associated with their organization	E	Yes	
Add, Edit, Inactivate User	ability to store reason for inactivation of user account	E	Yes	
Add, Edit, Inactivate User	ability for jurisdictional admin to reactivate an inactivated account	E	Yes	
Add, Edit, Inactivate User	ability to electronically notify a user that their account is locked (inaccessible) as per jurisdictional security policy	O	Yes	WebIZ provides immediate feedback to the user on the login page when a failed authentication occurs.
Add, Edit, Inactivate User	ability to electronically notify a user that their account is inactive	O	Yes	WebIZ provides immediate feedback to the user on the login page when a failed authentication occurs. There is also an ability to do this utilizing task module.
Add, Edit, Inactivate User	capture clinician activity status (out of state, loss of certification, change of practice status, other)	O	Yes	WebIZ User Profile page captures statuses such as license issue and expiration dates along with address information.
Add, Edit, Inactivate User	ability for jurisdictional admin to assign a role to authorized users	E	Yes	
Add, Edit, Inactivate User	ability for organization admin to assign a role to authorized users within their organization	E	Yes	
Authentication & Authorization	ability to authenticate user	E	Yes	
Authentication & Authorization	ability to access the system through an authorized username and password	E	Yes	
Authentication & Authorization	ability to support access via single-sign in for jurisdictional users	O	Yes	Envision is actively in progress with a project to support a standard SSO solution for our client community. This is expected to be completed by the end of 2026.
Authentication & Authorization	ability to switch between multiple organizations	O	Yes	
Authentication & Authorization	ability to view jurisdictional policy agreements	E	Yes	
Authentication & Authorization	support multi-factor authentication per jurisdictional policy	O	Yes	Envision is actively in progress with a project to support MFA. This is expected to be completed by the end of 2026.
Password Management	ability to generate electronic notification to authorized user of account credentials	E	Yes	
Password Management	ability to electronically notify authorized users of their username	E	Yes	
Password Management	ability to electronically notify authorized users of their temporary password in a separate notification	E	Yes	
Password Management	ability to generate electronic notification at periodic intervals to authorized users of their pending account password expiration	E	Yes	
Password Management	ability for jurisdictional admin to configure the periodic intervals for generation of notifications to authorized users of their pending account password expiration	O	Yes	
Password Management	ability to support temporary password which will be required to change during initial log in	E	Yes	
Password Management	ability to support temporary password which will expire in X number of days determined by policy	E	Yes	
Password Management	ability for users to change their own passwords per program/jurisdiction security policy	E	Yes	
Password Management	ability for users to reset their password per program/jurisdiction security policy	E	Yes	
Password Management	ability to prompt users to change their password at time intervals per program/jurisdiction security policy	E	Yes	

Function: Support Interoperability

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Onboarding	ability to onboard organizations/facilities to facilitate electronic data exchange	E	Yes	
Onboarding	ability to track an organization's/facility's progress through the onboarding process	O	Yes	
Onboarding	ability to capture EHR system specification details	E	Yes	
Onboarding	ability to create a unique username to assign to the organizations/facilities during the test phase	E	Yes	
Onboarding	ability to create a unique password to assign to the organizations/facilities during the test phase	E	Yes	
Onboarding	ability to electronically alert the vendor/organization when the certificate for transport is going to expire in X time period	E	Yes	DevOps has two methods to check upcoming certificate expirations. One is a script that checks upcoming expirations and creates a Azure DevOps (ADO) work item. The other is an Azure monitor alert that starts 30 days out and notifies DevOps via a Teams Channel. DevOps then uses the ADO ticket to work with the CEMs to get the certificates requested and the Azure alert allows them to get constant reminders as we near the expiration date.
Onboarding	ability to store digital certificate information	E	Yes	
Onboarding	ability to validate that the transport layer between the test site and IIS is functional	E	Yes	
Onboarding	ability to validate system connectivity prior to the submission of test data	E	Yes	
Onboarding	ability to identify data formatting errors during testing	E	Yes	The HL7 Message Log features an Analyze tool which allows the user to perform detailed analysis of any errors or warnings received while submitting HL7 data. This tool is fully validated by AIRA.
Onboarding	ability to provide test message submission summary report to the EHR vendor	E	Yes	Dashboard/Analytics Traffic Analysis Report Cards Report is able to provide this information.
Onboarding	ability for EHR vendor to view details regarding the processing of test data in terms of errors and warnings in the messages	E	Yes	Dashboard/Analytics Traffic Analysis Report Cards Report is able to provide this information.
Onboarding	ability for IIS authorized staff to review and approve onboarding forms	E	Yes with customization*	There is an active project underway to further enhance our onboarding solution that has an estimated completion date of Spring 2027.
Onboarding	ability for IIS staff to review and reject onboarding forms	E	Yes with customization*	There is an active project underway to further enhance our onboarding solution that has an estimated completion date of Spring 2027.
Onboarding	ability for applicant to edit a rejected onboarding application	E	Yes with customization*	There is an active project underway to further enhance our onboarding solution that has an estimated completion date of Spring 2027.
Onboarding	ability for applicant to save a rejected onboarding application	E	Yes with customization*	There is an active project underway to further enhance our onboarding solution that has an estimated completion date of Spring 2027.
Onboarding	ability for applicant to resubmit a rejected onboarding application	E	Yes with customization*	There is an active project underway to further enhance our onboarding solution that has an estimated completion date of Spring 2027.
Onboarding	ability to compare onboarding application information to current records to determine most current data	E	Yes with customization*	This feature is not currently available within WebIZ, however this has been identified as a future enhancement once our HL7 onboarding in Production project is complete. This project has a target completion date of spring 2027.
Interfaces	ability to interface with other systems to facilitate electronic data sharing/exchange per jurisdictional policy	E	Yes	
Interfaces	ability to interface with electronic health record systems	E	Yes	
Interfaces	ability to interface with the Immunization Gateway	E	Yes	
Interfaces	ability to interface with an application that facilitates patient scheduling	E	Yes with customization*	This feature is not currently available within WebIZ and is not identified as a current priority within the Envision WebIZ community. Should the State of West Virginia have interest, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.

Function: Support Interoperability

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Interfaces	ability to exchange data with CDC Vaccine Tracking System (VTrckS) based on most current CDC ExtS Specifications	E	Yes	
Interfaces	ability to order vaccine via electronic interface with VTrckS	E	Yes	
Interfaces	ability to receive vaccine inventory/shipping information	E	Yes	
Interfaces	ability to batch export vaccine inventory for submission to VTrckS	E	Yes	
Interfaces	ability to batch export vaccine ordering information for submission to VTrckS	E	Yes	
Interfaces	ability to batch export facility information	E	Yes	
Interfaces	ability to export vaccine return and wastage data to VTrckS	E	Yes	
Interfaces	ability to use the VTrckS-API for file exchange between the IIS and VTrckS based on CDC requirements and API file specifications	O	Yes	
Interfaces	ability to receive data through an interface with jurisdictional vital records system	E	Yes	
Interfaces	ability to update IIS data from Vital Records for birth events	E	Yes	
Interfaces	ability to update IIS data from Vital Records for death events	E	Yes	
Interfaces	ability to update IIS data from Vital Records for adoption events	E	Yes	
Interfaces	ability to update IIS data from Vital Records for name change events	E	Yes	
Interfaces	ability to detect if a newborn record is a potential duplicate in the IIS	E	Yes	
Interfaces	ability to use new Vital Record data for matched records to update patient demographic data	E	Yes	
Interfaces	ability to update the IIS with date of death from Vital Records data	E	Yes	
Interfaces	ability to prevent updates to IIS records	O	Yes	
Data Exchange	ability to support real-time data exchange per the CDC HL7 implementation guide	E	Yes	
Data Exchange	ability to process an HL7 message	E	Yes	
Data Exchange	ability to respond to an HL7 message	E	Yes	
Data Exchange	ability to respond to an HL7 message	E	Yes	
Data Exchange	ability to create an HL7 message	E	Yes	
Data Exchange	ability to capture IIS Core Data Elements	E	Yes	
Data Exchange	ability to store IIS Core Data Elements	E	Yes	
Data Exchange	ability to accept last prior version of HL7 messages	E	Yes	WebIZ only accepts HL7 v2.5.1 messages. However, we can use Rhapsody & Link for conversion if needed.
Data Exchange	ability to manually correct a submitted record and resubmit for processing	O	Yes	
Data Exchange	ability to support data exchange in non-HL7 format	E	Yes	
Data Exchange	ability to import bulk patient demographic information into IIS	E	Yes	Envision is actively participating in the Helios Bulk Data Project.
Data Exchange	ability to import bulk immunization information into IIS	E	Yes	
Data Exchange	ability to export routine, seasonal, and emergency vaccination files (aggregate and de-identified)	E	Yes	
Data Exchange	ability to export routine, seasonal, and emergency vaccination files (aggregate and de-identified) automatically via CDC approved system	O	Yes	
Data Exchange	ability to monitor and troubleshoot data exchange	E	Yes	
Data Exchange	ability to view VXU messages submitted by an organization	E	Yes	
Data Exchange	ability to view HL7 messages for an organization within a defined date range per jurisdictional policy	E	Yes	
Data Exchange	ability to view HL7 ACK messages generated for an organization	E	Yes	
Data Exchange	ability to view incoming HL7 QBP messages submitted by an organization	E	Yes	
Data Exchange	ability to view RSP messages generated for an organization	E	Yes	
Data Exchange	ability to log acknowledgement messages indicating warnings and errors	E	Yes	
Data Exchange	ability to retrieve error messages within a specified date range by organization	E	Yes	
Data Exchange	ability to retrieve acknowledgment messages within a specified date range by organization	E	Yes	
Data Exchange	ability to filter error messages	E	Yes	
Data Exchange	ability to filter acknowledgement messages	E	Yes	
Data Exchange	ability to sort error messages	E	Yes	The Dashboard/Analytics module allows the user to sort error messages by a variety of criteria including date/time, organization, error type, etc.
Data Exchange	ability to sort acknowledgement messages	E	Yes	The Dashboard/Analytics module allows the user to sort error messages by a variety of criteria including date/time, organization, error type, etc.

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Patient Matching & Deduplication	ability to prevent duplicate patient records in the IIS database	E	Yes	
Patient Matching & Deduplication	ability to automatically identify incoming patient records as potential duplicates	E	Yes	WebIZ utilizes matching logic on incoming patient records to prevent duplicate patients via the HL7 interface and direct entry in the user interface. In HL7, if a single patient match is found, the record is updated. If multiple matches are found and a duplicate is created, a nightly job executes to identify the potential duplicates for either an auto-merge or manual merge processes. When a user is creating a new patient in the user interface, they must first complete a search to determine if a patient record exists for the new patient and avoid creating a duplicate. A list of potential matches are provided to the user and they can then select an existing record or continue with the creation of a new patient.
Patient Matching & Deduplication	ability to automatically identify existing patient records as potential duplicates	E	Yes	
Patient Matching & Deduplication	ability to automatically consolidate two or more duplicate records	E	Yes	
Patient Matching & Deduplication	ability to generate electronic notification of potential duplicates for manual review	E	Yes	Authorized users can access the Patient De-Duplication module to review and perform patient merges at any time in WebIZ. WebIZ will load all potential patient duplicates and the authorized user will have a queue to work through.
Patient Matching & Deduplication	ability to automatically match an incoming patient record with existing records to avoid a duplicate record being created	E	Yes	WebIZ utilizes matching logic on incoming patient records to prevent duplicate patients via the HL7 interface. In HL7, if a single patient match is found, the record is updated.
Patient Matching & Deduplication	ability to set thresholds for patient matching	E	Yes	WebIZ includes a feature to identify potential patient duplicates for records within the database (data at rest), via a nightly job. This feature allows users to set thresholds and activate/inactivate specific search cases to increase or decrease the probability of a match.
Patient Matching & Deduplication	ability to view all potential duplicate patient records for an individual patient simultaneously	E	Yes	Users are able to view a list of all potential duplicates for a given patient.
Patient Matching & Deduplication	ability for jurisdictional admin to edit thresholds to increase the probability of a match	E	Yes	
Patient Matching & Deduplication	ability for jurisdictional admin to edit thresholds to reduce the probability of a match	E	Yes	
Patient Matching & Deduplication	ability to flag potential duplicate patient records for manual review that cannot be resolved automatically	E	Yes	
Patient Matching & Deduplication	ability to view all potential duplicate patient records simultaneously	E	Yes	
Patient Matching & Deduplication	ability for admin to manually merge patient records	E	Yes	
Patient Matching & Deduplication	ability for organizational/facility user to manually merge patient records from their own organization/facility	E	Yes	
Patient Matching & Deduplication	ability to manually flag two or more patient records as potential duplicates	E	Yes	
Patient Matching & Deduplication	ability to prevent manual review of records previously indicated as "not a duplicate"	E	Yes	
Patient Matching & Deduplication	ability to flag a patient as "not a duplicate" during manual review	E	Yes	

Function: Ensure Data Quality

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Patient Matching & Deduplication	ability to maintain "not a duplicate" flag for resolved patient records	E	Yes	
Patient Matching & Deduplication	ability to select data elements from the patient records to maintain within the consolidated record	E	Yes	
Patient Matching & Deduplication	ability to retain "pre-merged" records for reference	E	Yes	
Patient Matching & Deduplication	ability to separate patient records that were incorrectly merged	E	Yes	The application can restore two patients to their state at the time of the merge via an un-delete process. Data that was updated after the merge would need to be analyzed and manually added to the appropriate patient.
Vaccination Event Matching & Deduplication	ability to prevent potential duplicate vaccination events at the immunization level	E	Yes	
Vaccination Event Matching & Deduplication	ability to automatically identify incoming vaccination event as potential duplicates	E	Yes	WebIZ includes logic to prevent duplicate vaccinations from being added via the HL7 interface. A nightly job executes to identify the potential duplicates for a manual merge process.
Vaccination Event Matching & Deduplication	ability to automatically select the most accurate vaccination event based on deduplication rules	E	Yes	
Vaccination Event Matching & Deduplication	ability to automatically identify existing vaccination events as potential duplicates	E	Yes	
Vaccination Event Matching & Deduplication	ability to manually flag potential duplicate vaccination events for manual review	E	Yes	WebIZ has business rules in place via incoming HL7 messages and via the UI to stop a duplicate entry before saving the duplicate vaccination. WebIZ also includes a mechanism to manually review potential vaccination duplicates.
Vaccination Event Matching & Deduplication	ability to display potential duplicate vaccine records for an individual patient	E	Yes	
Vaccination Event Matching & Deduplication	ability to manually merge a duplicate vaccination event	E	Yes	
Vaccination Event Matching & Deduplication	ability to manually delete a duplicate vaccination event	E	Yes	
Vaccination Event Matching & Deduplication	ability to automatically consolidate two or more duplicate vaccination events	E	Yes	
Vaccination Event Matching & Deduplication	ability to retain "pre-merged" or "pre-consolidated" vaccination events for reference	E	Yes	
Vaccination Event Matching & Deduplication	ability to separate vaccination events that were incorrectly merged or consolidated	E	Yes	

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: indicate the anticipated cost and timeline for development and release.
Clinical Decision Support	ability to provide immunization clinical decision support according to ACIP recommendations	E	Yes	
Clinical Decision Support	ability to support a vaccine clinical decision support algorithm aligned with the CDC CDSi logic specifications	E	Yes	
Clinical Decision Support	ability for jurisdictional admin to update the CDS rules	E	Yes	Currently, WebIZ's recommender is managed by Envision. This process allows for consistent vaccine forecasting that is in accordance with ACIP recommendations and CDSi logic. We complete all recommender updates on behalf of all jurisdictions. Per PHII confirmation, "Envision's approach to updating the CDSi forecaster, system-wide, for all their jurisdictions (instead of each jurisdiction making their local changes) in accordance with ACIP changes meets the intent of the RTM requirement."
Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Child and Adolescent Immunization Schedule	E	Yes	
Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Recommended Catch-up Immunization Schedule for Children and Adolescents	E	Yes	
Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Adult Immunization Schedule	E	Yes	
Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Child and Adolescent Immunization Schedule and a patient's immunization history	E	Yes	
Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Recommended Catch-up Immunization Schedule for Children and Adolescents and a patient's immunization history	E	Yes	
Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Adult Immunization Schedule and a patient's immunization history	E	Yes	
Clinical Decision Support	ability to display and highlight vaccines that are due	E	Yes	
Clinical Decision Support	ability to display and highlight vaccines that are overdue	E	Yes	
Clinical Decision Support	ability to display an indication when a vaccine series is complete	E	Yes with customization*	Dose numbers are listed in the patient's immunization history in WebIZ. After the series is complete, WebIZ no longer recommends any future doses. There is an active project underway that will give an indication when a vaccine series is complete.
Clinical Decision Support	ability to display vaccine-specific contraindications according to CDC lists of vaccine contraindications	O	Yes	
Clinical Decision Support	ability to take into account contraindications and precautions in the vaccine forecast	E	Yes	
Clinical Decision Support	ability to take into account evidence of immunity in the vaccine forecast	E	Yes	
Clinical Decision Support	ability to generate a forecast of specific vaccines required for individuals who travel outside the US	O	Yes	
Clinical Decision Support	ability to maintain historical records of effective dates of previous forecast schedules	O	Yes	
Clinical Decision Support	ability to review an immunization schedule that was appropriate at the time of administration	O	Yes	
Clinical Decision Support	ability to apply an immunization schedule that was appropriate at the time of administration	O	Yes	
Clinical Decision Support	ability to account for immune globulins in vaccine forecasting	E	Yes	
Clinical Decision Support	ability to create test cases for reuse during user acceptance testing	E	Yes	In addition to publicly available CDSi test cases, Envision create additional test cases to verify vaccine forecasting accuracy. Envision's test cases can be provided upon request to assist with user acceptance testing.
Clinical Decision Support	ability to save test cases for reuse during user acceptance testing	E	Yes	In addition to publicly available CDSi test cases, Envision create additional test cases to verify vaccine forecasting accuracy. Envision's test cases can be provided upon request and saved, to assist with user acceptance testing.
Clinical Decision Support	ability to compare the expected results of the forecasting test case to the actual results observed by the tester	E	Yes	
Reminder/Recall	ability to generate patient-specific reminder/recall notifications	E	Yes	
Reminder/Recall	ability to select one or more vaccines for generating reminder/recall notifications	E	Yes	
Reminder/Recall	ability to view the date the reminder/recall notice was sent to a patient	O	Yes	

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Reminder/Recall	ability to generate lists of patients in need of a reminder or recall notification by organization	E	Yes	
Reminder/Recall	ability to generate reminder/recall notifications per consent designation	E	Yes	
Reminder/Recall	ability to generate patient-specific reminder/recall notices by user-defined parameters	E	Yes	
Reminder/Recall	ability to generate reminder/recall in user-defined format	E	Yes	
Reminder/Recall	ability to select the age of the cohort when generating reminder/recall notifications	E	Yes	
Reminder/Recall	ability to print patient-specific reminder/recall notices by user-defined parameters	E	Yes	
Reminder/Recall	ability to generate patient specific reminder/recalls in a user-defined format	E	Yes	
Reminder/Recall	ability for an end user to generate patient specific reminder/recalls in accordance with HIPAA and jurisdictional law or policy	E	Yes	
Reminder/Recall	ability for an end user to print patient specific reminder/recalls in accordance with HIPAA and jurisdictional law or policy	E	Yes	
Reminder/Recall	ability to generate vaccine recall notices by facility based on vaccine name, vaccination date range, and lot number	O	Yes with customization*	Reminder recall currently works based on vaccine series. If needed, we can work with the State of West Virginia to consider a future enhancement to include notices based on vaccine name and lot number for reminder recall.
Reminder/Recall	ability to generate vaccine recall notices by administering provider based on vaccine name, vaccination date range, and lot number	O	Yes with customization*	Reminder recall currently works based on vaccine series. If needed, we can work with the State of West Virginia to consider a future enhancement to include notices based on vaccine name and lot number for reminder recall.
Reminder/Recall	ability to set the limit/number of times a patient will receive a reminder/recall	O	Yes	
Reminder/Recall	ability to modify the limit/number of times a patient will receive a reminder/recall	O	Yes	
Reminder/Recall	ability to exclude a patient who has met the limit/number of times to receive a reminder/recall	O	Yes	
Reminder/Recall	ability to generate a list of phone numbers for patients needing reminder/recall	O	Yes	
Reminder/Recall	ability to manually review a patient list for a reminder/recall notification	E	Yes	
Reminder/Recall	ability to flag patients to exclude before sending a reminder/recall notification	O	Yes	
Reminder/Recall	ability to establish a time interval between reminder recall notices (e.g., 90 days or 60 days)	O	Yes	
Reminder/Recall	ability to generate a reminder/recall notifications for patients with an active status for their organization	E	Yes	
Reminder/Recall	ability to generate reports that include reminder/recall history for specific date range	O	Yes	
Reminder/Recall	ability to make all reminder/recall data accessible to authorized users for a predetermined period of time	O	Yes	There is no predetermined period of time in effect. However, WebIZ allows you to delete based on any time frame your jurisdiction prefers.
Reminder/Recall	ability to aggregate multiple notices going to the same address into one notification	O	Yes	WebIZ aggregates all notices for a patient together regardless of the number of overdue vaccine groups.
Coverage Reports	ability to generate report(s) displaying information on immunization coverage rate(s) among select populations	E	Yes	
Coverage Reports	ability to generate report(s) for organizations and facilities per CDC Immunization Quality Improvement for Providers program guidance on immunization coverage among an organization/facility patient population	E	Yes	
Coverage Reports	ability to generate report(s) on immunization coverage for a user-defined geographic area	E	Yes	
Coverage Reports	ability to generate report(s) on immunization coverage for a patient cohort	E	Yes	
Coverage Reports	ability to view and modify list of patients to be included in immunization coverage report	O	Yes	
Coverage Reports	ability to generate report(s) displaying immunization coverage trends over time, over a selected timeframe	E	Yes	
Coverage Reports	ability to generate report(s) that display the number of missed opportunities for vaccination	E	Yes	
Coverage Reports	ability to generate report(s) displaying the number of patients late up-to-date for immunization who are up-to-date as of today	E	Yes	The Not Up To Date / Missing Immunizations Patient Listing Report provides aggregate data and a patient listing for patients that were not up-to-date at the Compliancy Date, but are up-to-date at the Assessment Date.
Coverage Reports	ability to generate report(s) that display the number of invalid vaccine doses	E	Yes	
Coverage Reports	ability to generate report(s) displaying vaccine exemption rates	E	Yes	

Function: Evaluate and Forecast

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Coverage Reports	ability to generate report(s) displaying immunization coverage by user-defined parameters	E	Yes	
Coverage Reports	ability to generate report(s) displaying immunization coverage by vaccine type	E	Yes	
Coverage Reports	ability to generate report(s) displaying immunization coverage by age range	E	Yes	
Coverage Reports	ability to generate report(s) displaying immunization coverage by ethnicity	E	Yes	
Coverage Reports	ability to generate report(s) displaying immunization coverage by race	E	Yes	
Coverage Reports	ability to generate report(s) displaying immunization coverage by patient sex	O	Yes	

Function: Manage Patient and Immunization Records

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Patient Search	ability to search for patient records	E	Yes	
Patient Search	ability to search patient record based on one or multiple user-defined parameters	E	Yes	
Patient Search	ability to re-search for a patient record by modifying existing search parameters	E	Yes	
Patient Search	ability to display the list of returned possible patient matches per jurisdictional policy	E	Yes	
Patient Search	ability to select a patient record from the list of possible patient matches	E	Yes	
Add, Edit Patient Demographics	ability to add demographic information to a patient record	E	Yes	
Add, Edit Patient Demographics	ability to create a new patient record	E	Yes	
Add, Edit Patient Demographics	ability to edit demographic information in a patient record	E	Yes	
Add, Edit Patient Demographics	ability to insert permanent comments in a patient's record that can be viewed based on role/permission	E	Yes	
Add, Edit Patient Demographics	ability to display the user who created the permanent comment in a patient's record	E	Yes	
Add, Edit Patient Demographics	ability to prevent a patient record from being saved unless required fields are completed, per jurisdictional policy	E	Yes	
Add, Edit Patient Demographics	ability to automatically notify a user when attempting to submit an incomplete patient record	E	Yes	
Add, Edit Patient Demographics	ability to store CDC-endorsed core data elements for all patient records	E	Yes	
Add, Edit Patient Demographics	ability to store multiple of reported names for each patient to include: first name, middle name, last name, alias, maiden name	E	Yes	
Add, Edit Patient Demographics	ability to store multiple patient addresses	O	Yes	WebIZ supports physical and mailing addresses and users can mark an address as temporary.
Add, Edit Patient Demographics	ability to support multiple patient address type designations (e.g. primary address, vacation address)	O	Yes	
Add, Edit Patient Demographics	ability to identify effective dates for use of a patient address	O	Yes	WebIZ stores patient address history data. Each address change is timestamped and the addresses are stored/displayed in chronological order.
Add, Edit Patient Demographics	ability to store all historic addresses for a patient	O	Yes	
Add, Edit Patient Demographics	ability to store country information related to where the patient was born	O	Yes	
Add, edit patient demographics	ability to flag patient address as a verified United States Postal Service address (e.g., via SmartyStreets)	O	Yes	
Add, edit patient demographics	ability to record date patient address last verified as a United States Postal Service address (e.g., via SmartyStreets)	O	Yes	
Add, Edit Patient Demographics	ability to automatically create a unique patient ID number	E	Yes	
Add, Edit Patient Demographics	ability to automatically associate patient ID number to the patient's record	E	Yes	
Add, Edit Patient Demographics	ability to track patients of all ages per jurisdictional law or policy	E	Yes	
Add, Edit Patient Demographics	ability to store mother's HBsAg status for a patient	O	Yes	This is stored within the Hep B module of WebIZ.
Add, Edit Patient Demographics	ability to store a patient's occupation	E	Yes	
Add, Edit Patient Demographics	ability to designate patient as belonging to a priority group for vaccination	O	Yes	
Add, Edit Patient Demographics	ability to store multiple patient identifiers	E	Yes	

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Add, Edit Patient Demographics	ability to assign patient records to a cohort	E	Yes	WebIZ's Education module supports enrolling patients as students to Schools. Reports are available that can be run based on students enrolled at the select School Districts or Schools. WebIZ also supports the creation of patient cohorts based on geography and the patient's Provider/Clinic.
Add, Edit Patient Demographics	ability to assign patient records to multiple cohorts	E	Yes	WebIZ's Education module supports enrolling patients as students to Schools. Reports are available that can be run based on students enrolled at the select School Districts or Schools. WebIZ also supports the creation of patient cohorts based on geography and the patient's Provider/Clinic.
Add, Edit Patient Demographics	ability to view patient records by cohort	E	Yes	WebIZ's Education module supports enrolling patients as students to Schools and patients can be viewed via the School Roster Report.
Add, Edit Patient Demographics	ability to remove patient records from a cohort	E	Yes	WebIZ's Education module supports enrolling and removing enrollments for patients as students to Schools. WebIZ also supports the creation of patient cohorts based on geography and the patient's Provider/Clinic, which will include or exclude patients based on the chosen criteria.
Patient Status	ability to manage patient status at the organization/facility level	E	Yes	
Patient Status	ability to store active patient status at the organization/facility level	E	Yes	
Patient Status	ability to store inactive patient status at the organization/facility level	E	Yes	
Patient Status	ability to edit active patient status at the organization/facility level	E	Yes	
Patient Status	ability to edit inactive patient status at the organization/facility level	E	Yes	
Patient Status	ability to store reason for inactive status of patients at the organizational/facility level	E	Yes	
Patient Status	ability to edit multiple patients status in one action	O	Yes	
Patient Status	ability to manage patient status at the geographic jurisdictional level	E	Yes	
Patient Status	ability to store active patient status at the geographic jurisdiction level	E	Yes	
Patient Status	ability to store inactive patient status at the geographic jurisdictional level	E	Yes	
Patient Status	ability to edit active patient status at the geographic jurisdictional level	E	Yes	
Patient Status	ability to edit inactive patient status at the geographic jurisdictional level	E	Yes	
Patient Status	ability to store reason for inactive status of patients at the geographic jurisdictional level	O	Yes	
Patient Status	ability to restrict access to patient records that have been placed in an inactive status	O	Yes with Customization*	WebIZ can restrict access with other patient statuses, just not geographic jurisdictional level status. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Patient Status	ability to restrict edits to patient records that have been placed in an inactive status	O	Yes with Customization*	WebIZ can restrict editing with other patient statuses, just not geographic jurisdictional level status. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Patient Consent	ability to manage patient consent per jurisdictional policy	E	Yes	WebIZ does not include a feature to collect consent for patients to participate in the IIS. All patient's are opted in until they request to be opted out. WebIZ does include an opt out feature that will update a patient's status to opt out and prevent the collection of vaccination data for that patient.
Patient Consent	ability to update patient consent on a patient's record	E	Yes	
Patient Consent	ability to opt out a patient from participating in the IIS	E	Yes	

Function: Manage Patient and Immunization Records

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No * Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Patient Consent	ability to opt in a patient for participation in the IIS	E	Yes	
Patient Consent	ability to enable access to a patient record per consent designation	E	Yes	WebIZ does not include a feature to collect consent for patients to participate in the IIS. All patient's are opted in until they request to be opted out. WebIZ does include an opt out feature that will update a patient's status to opt out and prevent the collection of vaccination data for that patient.
Patient Consent	ability to enable updates to a patient record per consent designation	E	Yes	
Add, Edit Patient Immunization	ability to add vaccination event information to a patient record	E	Yes	
Add, Edit Patient Immunization	ability to edit vaccine information in a patient record	E	Yes	
Add, Edit Patient Immunization	ability to mark vaccine information in a patient record for deletion	O	Yes	
Add, Edit Patient Immunization	ability to add reason for deletion of vaccine information in a patient record	O	Yes	User has the ability to enter a Patient Note for the reason of deleting the vaccination record.
Add, Edit Patient Immunization	ability to capture vaccine eligibility by vaccine dose for publicly purchased vaccine	E	Yes	
Add, Edit Patient Immunization	ability to store vaccine eligibility by vaccine dose for publicly purchased vaccine	E	Yes	
Add, Edit Patient Immunization	ability to report multiple doses administered to the same patient on the same administration date via the UI	E	Yes	
Add, Edit Patient Immunization	ability to store all CDC-endorsed core data elements related to vaccine events	E	Yes	
Add, Edit Patient Immunization	ability to enter vaccination substandard or otherwise compromised flag	E	Yes	
Add, Edit Patient Immunization	ability to view submitted vaccination event information on a patient's record	E	Yes	
Add, Edit Patient Immunization	ability to store adverse reactions in accordance with Vaccine Recommendations and Guidelines of the ACIP	E	Yes	
Add, Edit Patient Immunization	ability to flag an adverse reaction as having been reported to VAERS	E	Yes	Users have the ability to add the details of an adverse reaction to an immunization within the application, including the date it was reported to VAERS.
Add, Edit Patient Immunization	ability to store patient vaccination event funding eligibility information	E	Yes	
Add, Edit Patient Immunization	ability to print form for signature of vaccine refusal by patient for each individual vaccine antigen	O	Yes with Customization*	WebIZ provides the ability for jurisdictions to upload PDF forms that are made available to users for printing. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Add, Edit Patient Immunization	ability to ensure that the default lot number is from the oldest lot when entering an administered dose from inventory	E	Yes	Vaccine expiration date is displayed in the selector for vaccines to choose, and items are displayed in order of ascending expiration date (oldest first).
Add, Edit Patient Immunization	ability to record administration of vaccination regardless if vaccine has since expired in inventory	E	Yes	
Add, Edit Patient Immunization	ability to track vaccinations that require adjuvant	E	Yes	The presence of an adjuvant is not recorded separately as a field. It is tied to the vaccine's CVX and NDC which already indicate whether that product contains an adjuvant.
Print/Export Record	ability to securely print a patient immunization record	E	Yes	
Print/Export Record	ability to include evaluated history in the printable version of the patient record	E	Yes	
Print/Export Record	ability to include the forecast in the printable version of the patient record	E	Yes	
Print/Export Record	ability to include immunity in the printable version of the patient record	E	Yes	

Function: Manage Patient and Immunization Records

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Print/Export Record	ability to securely export a patient immunization record	E	Yes	
Print/Export Record	ability to export a patient record in user-defined format	O	Yes	
Mass Vaccination	ability to support mass vaccination operations	E	Yes	
Mass Vaccination	ability to rapidly capture patient demographic information offline during mass vaccination clinic for later upload/saving	E	Yes	WebIZ currently includes a Mass Events module out of the box. We also have a file import process where patient vaccination information can be captured offline then imported into WebIZ for addition to the IIS. We can collaborate with the State of West Virginia to further enhance this functionality to accommodate additional offline data capture, upload and processing.
Mass Vaccination	ability to rapidly capture vaccine information offline during mass vaccination clinic for later upload/saving	E	Yes	WebIZ currently includes a Mass Events module out of the box. We also have a file import process where patient vaccination information can be captured offline then imported into WebIZ for addition to the IIS. We can collaborate with the State of West Virginia to further enhance this functionality to accommodate additional offline data capture, upload and processing.
Mass Vaccination	ability to support rapid capture of patient demographic information during mass vaccination clinic	E	Yes	Application includes an IZ Quick Add Module to support the rapid capture of patient demographics.
Mass Vaccination	ability to support rapid capture of vaccine information during mass vaccination clinic	E	Yes	
Mass Vaccination	ability to administer vaccines during public health emergency without impacting the patient's status at the organization/facility level	O	Yes	
Mass Vaccination	ability for jurisdictional admin to flag/indicate org/facility participation in mass vaccination event	O	Yes	

Function: Manage Vaccine Inventory

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Vaccine Inventory Search	ability to search inventory by user-defined parameters	E	Yes	
Vaccine Inventory Search	ability to search the inventory by funding source	E	Yes	
Vaccine Inventory Search	ability to search inventory by vaccine type	E	Yes	
Vaccine Inventory Search	ability to search inventory by vaccine lot number	E	Yes	
Vaccine Inventory Search	ability to search inventory by vaccine NDC code	E	Yes	
Add, Edit Vaccine Inventory	ability to manage vaccine inventory	E	Yes	
Add, Edit Vaccine Inventory	ability to support visualization of current vaccine inventory	E	Yes	WebIZ displays the details of each inventory item, including current number of on-hand doses. There are also visual indicators for expiring and expired vaccine.
Add, Edit Vaccine Inventory	ability to edit inventory funding source at the lot level	E	Yes	
Add, Edit Vaccine Inventory	ability to edit inventory funding source at the vaccine level	E	Yes	
Add, Edit Vaccine Inventory	ability to add vaccine information to inventory	E	Yes	
Add, Edit Vaccine Inventory	ability to support barcode scanning system to electronically upload vaccine inventory to the IIS	O	Yes with customization*	WebIZ utilizes the VTrcks API. All shipment files are processed via the API and do not require any manual intervention. Barcode scanning for Private inventory is not currently available within WebIZ and is not identified as a current priority within the Envision WebIZ community. Should the State of West Virginia have interest, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Add, Edit Vaccine Inventory	ability to view current inventory list by facility	E	Yes	
Add, Edit Vaccine Inventory	ability to view current inventory list by organization	E	Yes	
Add, Edit Vaccine Inventory	ability for jurisdictional admin to edit organization/facility inventory	E	Yes	
Add, Edit Vaccine Inventory	ability to manage vaccine borrowed from lots belonging to one funding source to lots belonging to another funding source	O	Yes	
Add, Edit Vaccine Inventory	ability to reclassify funding source of borrowed vaccine from private to public or vice versa for replacement cases	O	Yes	
Add, Edit Vaccine Inventory	ability to view storage capability	E	Yes	
Add, Edit Vaccine Inventory	ability to document vaccine storage and handling events such as temperature excursions	E	Yes	

Capability		Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Add, Edit Vaccine Inventory	ability to store storage capability		E	Yes	
Vaccine Ordering	ability for rule based logic to recommend vaccine order quantity		E	Yes	
Vaccine Ordering	ability to alert user when "reorder recommendation" inventory level is reached		O	Yes with customization*	WebIZ provides inventory management at a dose level. The reorder recommendation feature is not currently available within WebIZ and is not currently available within WebIZ and is not identified as a current priority within the Envision WebIZ community. Should the State of West Virginia have interest, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Vaccine Ordering	ability to pre-populate order with recommended quantities based on inventory, doses reported as administered to IIS		E	Yes	
Vaccine Ordering	ability to edit pre-populated order quantity		E	Yes	
Vaccine Ordering	ability to order vaccines		E	Yes	
Vaccine Ordering	ability for jurisdictional admin to activate vaccines available for ordering		E	Yes	
Vaccine Ordering	ability for jurisdictional admin to inactivate vaccines available for ordering		E	Yes	
Vaccine Ordering	ability to order publicly-purchased vaccines		E	Yes	
Vaccine Ordering	ability to view all orders by user-defined parameters		O	Yes	
Vaccine Ordering	ability to update delivery hours to receive shipments		E	Yes	
Vaccine Ordering	ability to enter a reason for vaccine orders outside the recommended order quantity		E	Yes	
Vaccine Ordering	ability to search and view past vaccine orders by facility within a specified timeframe		E	Yes	
Vaccine Ordering	ability to verify contact information during each order without leaving ordering workflow		E	Yes	
Vaccine Ordering	ability to update contact information during each order without leaving ordering workflow		E	Yes with customization*	Contact information is presented during the ordering workflow, but user must access a separate page to request a contact update as changes to contacts require approval from a jurisdictional administrator. Being able to update contact information without leaving the order creation screen is not identified as a current priority within the Envision WebIZ community. Should the State of West Virginia have interest, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Vaccine Ordering	ability to save an unsubmitted order		E	Yes	
Vaccine Ordering	ability to update organization/facility contact information before submitting a vaccine order		E	Yes	
Vaccine Ordering	ability to cancel unsubmitted or unprocessed vaccine orders		E	Yes	
Vaccine Ordering	ability to edit unsubmitted or unprocessed vaccine orders		E	Yes	
Vaccine Ordering	ability to save an unsubmitted order after rejection		E	Yes	
Vaccine Ordering	ability to verify order information before order submitted		E	Yes	
Vaccine Ordering	ability for jurisdictional admin to reject a vaccine order		E	Yes	

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Vaccine Ordering	ability for jurisdictional admin to select a reason code when rejecting an order	E	Yes	
Vaccine Ordering	ability to edit an order after rejection	E	Yes	
Vaccine Ordering	ability to resubmit an order after rejection	E	Yes	
Vaccine Ordering	ability to electronically notify the facility of a rejected order	E	Yes	
Vaccine Ordering	ability to track the shipping status of orders	E	Yes	
Vaccine Ordering	ability to verify packing slip information after order is shipped	O	Yes	
Vaccine Ordering	ability to receive electronic notification when order quantity received does not match vaccine order	O	Yes	
Vaccine Ordering	ability to receive electronic notification when vaccine order received is damaged	O	Yes	When a user is receiving a shipment within WebIZ, they are able to add comments into the shipment receipt process noting the damage.
Vaccine Ordering	ability to request shipping label(s) for nonviable vaccine subject to return	O	Yes	
Vaccine Ordering	ability to search for past vaccine returns within a specified timeframe	E	Yes	
Vaccine Ordering	ability to view past vaccine returns within a specified time frame	E	Yes	
Vaccine Ordering	ability to pre-book vaccine orders	E	Yes	
Vaccine Ordering	ability for jurisdictional admin to allocate vaccine inventory per user defined parameters	E	Yes	
Vaccine Ordering	ability to activate vaccine ordering functionality for all designated organizations/facilities during a public health emergency	E	Yes	
Vaccine Ordering	ability for jurisdictional admin to create order sets	E	Yes	
Review/Approve Order	ability for jurisdictional admin to review order	E	Yes	
Review/Approve Order	ability to support a rules-based decision logic to approve or reject order if above or below recommended order quantity	O	Yes	This requirement is available within the Prebook module. When using auto-approve, orders within a designated jurisdiction threshold can be auto approved in bulk.
Review/Approve Order	ability for jurisdictional admin to approve order	E	Yes	
Review/Approve Order	ability for jurisdictional admin to adjust order	E	Yes	
Review/Approve Order	ability for jurisdictional admin to electronically accept VFC vaccine into inventory	E	Yes	
Review/Approve Order	ability to accept each vaccine product in the IIS after shipment is received	E	Yes	
Vaccine Dose Decrementing	ability to automatically decrement vaccine doses from inventory when matched vaccine doses are reported as administered	E	Yes	
Vaccine Dose Decrementing	ability to automatically match vaccine doses reported as administered to vaccine doses in inventory to facilitate dose decrementing	E	Yes	
Vaccine Dose Decrementing	ability to automatically decrement vaccine inventory in real-time via HL7 messaging	E	Yes	
Vaccine Dose Decrementing	ability to automatically decrement vaccine inventory in real-time via UI data entry	E	Yes	
Vaccine Inventory Reconciliation	ability to reconcile vaccine doses currently in physical storage with vaccine doses reflected in system inventory	E	Yes	
Vaccine Inventory Reconciliation	ability to document reductions in vaccine inventory due to outgoing vaccine transfers	E	Yes	
Vaccine Inventory Reconciliation	ability to electronically document reductions in vaccine inventory due to outgoing vaccine wastage	E	Yes	

Function: Manage Vaccine Inventory

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Vaccine Inventory Reconciliation	ability to enter current number of vaccine doses on-hand in physical storage	E	Yes	
Vaccine Inventory Reconciliation	ability to track and manage doses for vaccines: on hand, administered, wasted, expired, ordered, recalled, returned, transferred	E	Yes	
Vaccine Inventory Reconciliation	ability to enable removal of recalled lots from active inventory	E	Yes	
Vaccine Inventory Reconciliation	ability to print a reconciliation worksheet	O	Yes	
Vaccine Transfers	ability for jurisdictional admin to approve vaccine transfers	O	Yes	
Vaccine Transfers	ability for jurisdictional admin to initiate VFC vaccine transfers	O	Yes	
Vaccine Transfers	ability to accept VFC vaccine transfers	O	Yes	
Vaccine Transfers	ability for jurisdictional admin to reject vaccine transfers	O	Yes	
Vaccine Transfers	ability to search and view past vaccine transfers within a specified timeframe	O	Yes	
Vaccine Transfers	ability for jurisdictional admin to allow for direct vaccine transfer between facilities without jurisdictional pre-approval, but with jurisdictional visibility/oversight.	O	Yes	
Vaccine Wastage	ability to manage vaccine wastage	E	Yes	
Vaccine Wastage	ability to determine the total cost of wasted vaccine by user-defined parameters	E	Yes	
Vaccine Wastage	ability for jurisdictional admin to modify inventory quantity to reflect wastage	E	Yes	
Vaccine Wastage	ability for jurisdictional admin to assign reason for inventory wastage	E	Yes	
Vaccine Wastage	ability to determine the total doses of vaccine wasted by user-defined parameters	E	Yes	
Vaccine Expiration	ability to manage vaccine expiration	E	Yes	
Vaccine Expiration	ability to alert users to vaccine nearing expiration	O	Yes	
Vaccine Expiration	ability to provide alerts for inventory already expired	O	Yes	
Vaccine Expiration	ability for jurisdictional admin to modify inventory quantity removed from available inventory	E	Yes	

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) if Yes with customization: Indicate the anticipated cost and timeline for development and release.
Standard Reports	ability to generate a report that includes history and forecast	E	Yes	
Standard Reports	ability to generate a data quality report displaying information on the quality of submitted data	E	Yes	
Standard Reports	ability to generate a report that provides information on patient and vaccine matching and deduplication	E	Yes	
Standard Reports	ability to generate a report that provides information on data quality of data at rest	E	Yes	
Standard Reports	ability to generate data quality reports for HL7 submissions	E	Yes	
Standard Reports	ability to generate VFC reports	E	Yes	
Standard Reports	ability to generate a practice-level patient data report for VFC enrolled sites	E	Yes	
Standard Reports	ability to generate a doses administered report to support accountability for publicly-purchased vaccine	E	Yes	
Standard Reports	ability to generate a doses administered report for VFC enrolled sites	E	Yes	
Standard Reports	ability to generate VFC provider practice profiles	E	Yes	
Standard Reports	ability to generate a report showing the total number of select vaccines administered each month by facility	E	Yes	
Standard Reports	ability to generate a report displaying a change in vaccine administration patterns over a selected timeframe	E	Yes	
Standard Reports	ability to generate duplicate/merge record reports	E	Yes	
Standard Reports	ability to generate reports about IIS users	E	Yes	
Standard Reports	ability to generate vaccine management reports	E	Yes	
Standard Reports	ability to generate a report listing/identifying patients who received a recalled vaccine	E	Yes	
Standard Reports	ability to generate a report of patients declining or refusing vaccinations	O	Yes	
Standard Reports	ability to generate a report to calculate a facility's average vaccine usage	O	Yes	
Standard Reports	ability to generate VFC accountability reports for managing VFC inventories and orders	E	Yes	
Standard Reports	ability to generate vaccine inventory reports	E	Yes	
Standard Reports	ability to generate a report that provides/displays information about current inventory on hand	E	Yes	
Standard Reports	ability to generate a report that provides/displays information about inventory transactions	E	Yes	
Standard Reports	ability to generate report(s) that display information about vaccine order history	O	Yes	
Standard Reports	ability to generate report(s) that display information about vaccine wastage and returns	E	Yes	
Standard Reports	ability to generate a report that displays the vaccine orders submitted to VTrckS within a specific timeframe	E	Yes	
Standard Reports	ability to generate a report providing information about influenza pre-book orders	E	Yes	
Standard Reports	ability to query vaccine ordering patterns over a selected timeframe to indicate trends	O	Yes	
Standard Reports	ability to generate reports that provide information about organizations and facilities	O	Yes	
Standard Reports	ability for jurisdictional admin to generate report that lists immunizing facilities	O	Yes	
Standard Reports	ability for jurisdictional admin to generate a report that provides information on organizational/facility enrollment	O	Yes	
Standard Reports	ability for jurisdictional admin to access utilization of report/usage statistics	O	Yes	
Standard Reports	ability to generate reports that provide information about students and their immunization histories for school compliance	E	Yes	
Standard Reports	ability to generate report of student exemptions by type (medical, religious)	E	Yes	
Standard Reports	ability to generate a record of students' immunizations for school purposes	E	Yes	
Standard Reports	ability to generate exclusion letters stating which vaccine(s) a student needs to come into compliance with requirements and be permitted to attend school	E	Yes	WebIZ provides you the ability to see whether a student is compliant or not. The School Certificate logic identifies compliance to school requirements. This can be accessed within the WebIZ UI or via Public Portal by the parent/guardian.

Function: Provide Data Access

[Return to Cover Page](#)

Capability	Requirement: The IIS must/should have...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Standard Reports	ability to generate reports for individuals vaccinated during a mass vaccination event	E	Yes	
Standard Reports	ability to generate doses administered reports for priority groups during a public health emergency	E	Yes	
Standard Reports	ability to generate a report that provides information about the status of the system in terms of total entities	E	Yes	
Ad Hoc Queries & Reports	ability to generate queries and reports based on user-defined parameters	E	Yes	
Ad Hoc Queries & Reports	ability to schedule an ad hoc query to run on a predetermined interval (i.e., daily, weekly, monthly, quarterly or annual basis)	E	Yes	
Ad Hoc Queries & Reports	ability to generate reports with a user-defined report format	E	Yes	
Ad Hoc Queries & Reports	ability to generate reports across geographic hierarchy levels	E	Yes	
Ad Hoc Queries & Reports	ability to generate data to inform the public via website dashboards or similar means	E	Yes	
Ad Hoc Queries & Reports	ability to store saved report templates	E	Yes	
Ad Hoc Queries & Reports	ability to modify saved report templates	E	Yes	
Ad Hoc Queries & Reports	ability to inactivate (archive) saved report templates	E	Yes	
Ad Hoc Queries & Reports	ability to modify a query	E	Yes	
Ad Hoc Queries & Reports	ability to delete a query	E	Yes	
Ad Hoc Queries & Reports	ability to save an ad hoc query	E	Yes	
Ad Hoc Queries & Reports	ability to create a map using geocodes for statistical reporting	O	Yes	Geocodes exist in the database and there are many options for utilizing the data. The geocodes could be manually pulled by a DBA/Data Analyst and integrated into visualizations.
Print/Export Reports	ability to export IIS data for use in other systems	E	Yes	
Print/Export Reports	ability to export data in user-defined formats	E	Yes	
Print/Export Reports	ability to export aggregate level de-identified data	E	Yes	
Print/Export Reports	ability to export record level de-identified data	E	Yes	
Print/Export Reports	ability to print reports	E	Yes	
Consumer Access	ability for authorized consumers to access personal IIS data per jurisdictional policy	E	Yes	
Consumer Access	ability for authorized consumer to print forecast	O	Yes	
Consumer Access	ability for authorized consumer to print patient immunization record	E	Yes	
Consumer Access	ability for authorized consumer to print an official immunization history	E	Yes	
Consumer Access	ability for authorized consumer to retrieve a verifiable digital vaccine credential without assistance from IIS or immunization program staff	E	Yes	
Consumer Access	ability for authorized consumer to view immunization forecast	E	Yes	
Consumer Access	ability for authorized consumer to view patient information	E	Yes	
Consumer Access	ability for authorized consumer to view patient immunization record	E	Yes	
Consumer Access	ability for patient/patient representative to opt in for reminder/recall notifications	O	Yes	All patients are opted in by default. User with access to the application must set the value on behalf of the patient if opting out.
Consumer Access	ability for patient/patient representative to opt out of reminder/recall notifications	O	Yes	Opt out is possible - user with access to WebIZ have to set the value on behalf of the patient.

Non-functional

[Return to Cover Page](#)

Attribute	Sub Characteristic	Requirement: The IIS must/should...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Performance	Time Behavior	support a responsive user interface	E	Yes	
Performance	Time Behavior	support application launch, i.e. time between user initiation and application start, in less than 10 seconds	E	Yes	
Performance	Time Behavior	support response to a user navigation action (e.g., mouse movement, keypresses, navigation) in less than 1 second	E	Yes	Dependent on specific actions (e.g. run a complex query).
Performance	Time Behavior	support response to process submitted information via direct data entry in less than 4 seconds	E	Yes	Dependent on specific actions (e.g. run a complex query).
Performance	Time Behavior	support generation of a standard, pre-configured report in less than 30 seconds	E	Yes	The majority of standard reports will generate in less than 30 seconds. Reminder Recall reports are generated overnight via a scheduled job, due to the large amount of data that can be included. Users expanding beyond default criteria or filters could result in longer-running queries.
Performance	Time Behavior	support responsive data exchange system interfaces	E	Yes	
Performance	Time Behavior	support electronic response to a submitted HL7 message in 5 seconds or less, 95% of the time	E	Yes	
Performance	Capacity	support up to 1000 concurrent users of the user interface without performance degradation	E	Yes	
Performance	Capacity	support multiple users viewing the same data at the same time	E	Yes	
Performance	Capacity	support users using the same function at the same time without degrading IIS performance	E	Yes	
Performance	Resource Utilization	support resource-intensive tasks without degrading IIS performance	E	Yes	
Performance	Resource Utilization	support user queries via the user interface without degrading IIS performance	E	Yes	
Performance	Resource Utilization	support generation of ad hoc reports without degrading IIS performance	E	Yes	
Performance	Resource Utilization	support data extracts without degrading IIS performance	E	Yes	
Performance	Capacity	support efficient processing of HL7 messages without performance degradation, as per jurisdictional capacity needs	E	Yes	
Performance	Capacity	support processing of up to 200 of HL7 VXU messages per hour without performance degradation	E	Yes	
Performance	Capacity	support processing of up to 8000 of HL7 QBP messages per hour without performance degradation	E	Yes	
Performance	Capacity	support permanent storage of records as per jurisdictional policy	E	Yes	
Performance	Capacity	support storage of unlimited number of organization records	E	Yes	
Performance	Capacity	support storage of unlimited number of user records	E	Yes	
Performance	Capacity	support storage of unlimited number of patient records	E	Yes	
Performance	Capacity	support storage of unlimited number of patient immunization records	E	Yes	
Usability	Accessibility	meet the United States Access Board Section 508 Standards	E	Yes	WebIZ is actively working on a project ensuring we meet 508 standards. This is expected to be completed by the end of 2026. WebIZ will be WCAG 2.0 AA. Currently, our Public Portal is WCAG 2.0 AAA.
Usability	Operability	support best practices for web application session management (e.g., cookies, cache) as recommended by the Open Web Application Security Project (OWASP)	E	Yes	

Non-functional

[Return to Cover Page](#)

Attribute	Sub Characteristic	Requirement: The IIS must/should...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Usability	Operability	ability to execute Boolean searches	E	Yes with customization*	WebIZ does not currently support Boolean searches for a specific search field, but does provide numerous search parameters that can be used together for target searches. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Usability	Operability	ability to execute a wildcard searches	E	Yes	Feature is available in the application, but it is not suggested for general use as it could affect system performance.
Usability	User error protection	minimize data entry errors	E	Yes	
Usability	User error protection	assist in entering data correctly via pick-lists, drop-down boxes, or other easy-to-use options such as predictive text	E	Yes	
Usability	User error protection	indicate required fields for data entry	E	Yes	
Usability	User error protection	ability to provide alert when required fields are left blank	E	Yes	
Usability	User error protection	support cross-field checks to ensure accuracy of information where dependencies exist (e.g., warning that a child patient may be receiving an adult vaccine)	E	Yes	
Usability	User error protection	support spell check functionality with medical terminology for all free text fields	O	Yes with customization*	This feature is not currently available within WebIZ and is not identified as a current priority within the Envision WebIZ community. Should the State of West Virginia have interest, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Usability	User error protection	support differentiation between warning messages (rework is recommended prior to entry being continued) and error messages (error must be fixed prior to continuing)	E	Yes	
Usability	User interface	support alerts related to user interface response time	O	Yes	A few long running reports will display a counter to provide feedback to Users on the duration of the report generation.
Usability	User interface	support user feedback with a simple indicator for response times between 2-4 seconds	O	Yes with customization*	Envision monitors report execution times and makes performance updates as needed to support larger reports that may require longer processing times. There is an active project underway to further enhance these capabilities, including the addition of asynchronous processing that will allow users to initiate a report, navigate away, and return later to access the completed results. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.

Non-functional

[Return to Cover Page](#)

Attribute	Sub Characteristic	Requirement: The IIS must/should...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Usability	User interface	support user feedback with expected response time and percent-done indicator for response times greater than 4 seconds	O	Yes with customization*	Envision monitors report execution times and makes performance updates as needed to support larger reports that may require longer processing times. There is an active project underway to further enhance these capabilities, including the addition of asynchronous processing that will allow users to initiate a report, navigate away, and return later to access the completed results. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Usability	User interface	support users in stopping an operation expected to take longer than 10 seconds	O	Yes with customization*	Envision monitors report execution times and makes performance updates as needed to support larger reports that may require longer processing times. There is an active project underway to further enhance these capabilities, including the addition of asynchronous processing that will allow users to initiate a report, navigate away, and return later to access the completed results. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Usability	User interface	support users in performing other tasks while waiting for the system to complete tasks expected to take longer than 10 seconds	O	Yes with customization	Envision monitors report execution times and makes performance updates as needed to support larger reports that may require longer processing times. There is an active project underway to further enhance these capabilities, including the addition of asynchronous processing that will allow users to initiate a report, navigate away, and return later to access the completed results. Should the State of West Virginia require further enhancements to this process, we are happy to partner to define requirements, assess feasibility, estimate costs, and consider it for future roadmap inclusion.
Reliability	Availability	support availability of the system as per jurisdictional needs	E	Yes	
Reliability	Availability	support access to the web application 99.9% of the time	E	Yes	Calculation does not include scheduled maintenance windows (i.e., for application deployments).
Reliability	Availability	support processing of and response to HL7 messages 99.9% of the time	E	Yes	Calculation does not include scheduled maintenance windows (i.e., for application deployments).
Reliability	Recoverability	ability to backup the IIS data as per jurisdictional policy	E	Yes	

Non-functional

[Return to Cover Page](#)

Attribute	Sub Characteristic	Requirement: The IIS must/should...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Reliability	Recoverability	support redundancy of the IIS as per jurisdictional recovery plan	E	Yes	Redundancy is built into the solution via the Azure cloud architecture. Disaster Recovery site is also included with the IIS, with a 48 hour RTO.
Reliability	Recoverability	support real-time failover	E	Yes	
Reliability	Recoverability	support the recovery of backed up data as needed	E	Yes	
Reliability	Recoverability	support the restoration of IIS data after an outage or loss	E	Yes	
Reliability	Fault tolerance	support the efficient roll back of software changes as needed	E	Yes	
Security	Non-repudiation	support audit logs for security purposes	E	Yes	
Security	Integrity	ability to electronically notify the system administrator of unauthorized activity	E	Yes	
Security	Authenticity	ability to track all attempted accesses that fail identification, authentication and authorization requirements	E	Yes	WebIZ has an audit log that will track identification, authentication, and authorization. Envision utilizes a Web Application Firewall to track identification and authentication.
Security	Authenticity	ability to track all accesses that successfully comply with identification, authentication and authorization requirements	E	Yes	WebIZ has an audit log that will track identification, authentication, and authorization. We also have Web Application Firewall deployed to track identification and authentication.
Security	Non-repudiation	ability to maintain audit logs for specified time per jurisdictional policy	E	Yes	
Security	Non-repudiation	ability for jurisdictional admin to search audit log by function performed	E	Yes	The audit logs include this information and can be accessed via query.
Security	Non-repudiation	ability for jurisdictional admin to search audit log by date and time period	E	Yes	The audit logs include this information and can be accessed via query.
Security	Non-repudiation	ability for jurisdictional admin to search audit log by date range	E	Yes	The audit logs include this information and can be accessed via query.
Security	Non-repudiation	ability for jurisdictional admin to search audit log by user defined parameters	E	Yes	
Security	Non-repudiation	ability for jurisdictional admin to search audit log by patient identifiers	E	Yes	The audit logs include this information and can be accessed via query.
Security	Non-repudiation	ability for jurisdictional admin to filter audit log search by user defined parameters	O	Yes	In order to access the audit logs, authorized administrators must have a certain level of permission.
Security	Non-repudiation	ability for jurisdictional admin to sort audit log search results	O	Yes	In order to access the audit logs, authorized administrators must have a certain level of permission.
Security	Integrity	store audit data related to user access/viewing of patient records in the system	E	Yes	
Security	Integrity	store date of user access to a patient record	E	Yes	
Security	Integrity	store time of user access to a patient record	E	Yes	
Security	Integrity	store user ID of user access to a patient record	E	Yes	
Security	Non-repudiation	store audit data related to data changes in the system	E	Yes	
Security	Non-repudiation	store 'date received' for data modified in the system	E	Yes	
Security	Non-repudiation	store 'time received' for data modified in the system	E	Yes	
Security	Non-repudiation	store 'date updated' for data modified in the system	E	Yes	
Security	Non-repudiation	store 'time updated' for data modified in the system	E	Yes	
Security	Non-repudiation	store user associated with data modified in the system	E	Yes	
Security	Integrity	automatically enforce session timeout for a user when idle period is reached	E	Yes	Envision currently follows the NIST SP 800-63B recommendation of a 30-minute logout time.

Non-functional

[Return to Cover Page](#)

Attribute	Sub Characteristic	Requirement: The IIS must/should...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Security	Integrity	ability for automatic session timeout to be customized per jurisdictional policy	O	Yes	Envision currently follows the NIST SP 800-63B recommendation of a 30-minute logout time. However, we can consider adjusting this if it does not align with the jurisdiction's needs.
Security	Integrity	ability to notify the user the session will expire	O	Yes	
Security	Confidentiality	support masking of passwords as they are typed or entered into the user interface	E	Yes	Yes, password masking is enabled by default and Envision supports minimum password length and complexity rules that align with the jurisdiction's needs.
Security	Integrity	ability for system administrator to terminate user connections	E	Yes	Within the application an admin has the ability to suspend user access at an individual account or based on provider associations. In addition, there is the capability to suspend any HL7 messages coming into the system from a particular source.
Security	Confidentiality	Safeguard electronic personally identifiable information by implementing the appropriate technical best practices	E	Yes	
Security	Confidentiality	ability to encrypt personally identifiable information at rest	E	Yes	
Security	Confidentiality	ability to decrypt personally identifiable information at rest	E	Yes	All data at rest is encrypted with AES 256. Envision requires written approval from the jurisdiction before we decrypt the data.
Security	Confidentiality	ability to encrypt personally identifiable information during transmission	E	Yes	
Security	Confidentiality	ability to decrypt personally identifiable information during transmission	E	Yes	
Security	Integrity	ability to maintain firewalls per AIRA's Security Guidance Considerations for Immunization Information Systems document	E	Yes	
Security	Integrity	ability to maintain firewalls for protection of the hosting network	E	Yes	
Security	Integrity	ability to maintain firewalls for protection of the hosting environment	E	Yes	
Security	Integrity	ability to electronically notify the system admin of unauthorized activity	E	Yes	
Security	Integrity	ability to support anti-virus protection at current critical patch levels in the hosting environment	E	Yes	
Maintainability	Analyzability	support event logging	E	Yes	
Maintainability	Analyzability	ability for system admin to enable event logging on all servers	O	Yes	
Maintainability	Analyzability	ability for system admin to enable event logging on all devices	O	Yes	
Maintainability	Analyzability	ability for system admin to disable event logging on all devices	O	Yes	
Maintainability	Analyzability	ability for system admin to limit access to event logs, including System, Application, Web and Database logs	O	Yes	
Portability	Adaptability	support use of web browsers per jurisdictional policy	E	Yes	
Portability	Adaptability	support use of current version of web browsers	E	Yes	
Portability	Adaptability	support use of last prior version of web browsers	E	Yes	Envision tests using the most recent web browser version. Modern browsers are updated automatically and often. Envision has not encountered issues with users using a browser that has not been updated.
Portability	Adaptability	support a responsive design that renders properly on multiple devices	E	Yes	Many pages within the application utilize a responsive design, but there are some activities that are not conducive to small screen devices and will scroll on small windows.
Portability	Adaptability	support web client use on a desktop	E	Yes	

Non-functional

[Return to Cover Page](#)

Attribute	Sub Characteristic	Requirement: The IIS must/should...	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s) If Yes with customization: Indicate the anticipated cost and timeline for development and release.
Portability	Adaptability	support web client use on a laptop	E	Yes	
Portability	Adaptability	support web client use on a tablet	E	Yes	
Portability	Adaptability	support web client use on a smartphone	E	Yes	
Portability	Installability	be containerized (e.g., Docker or Kubernetes) to support easy installation and system updates	E	Yes	This requirement is currently in progress. This is a multi phase project that is currently being released in phases. Installation and updates is currently driven by a CI/CD process. Also, some services not in containers do still run a PaaS environment.
Portability	Installability	be containerized for cloud based environments	O	Yes	This requirement is currently in progress. This is a multi phase project that is currently being released in phases.