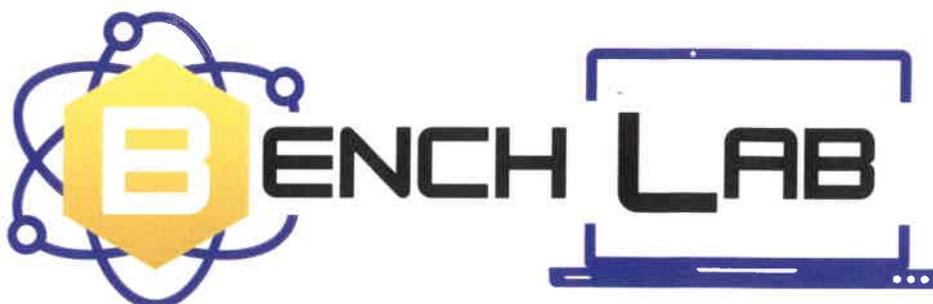


Original

## Letter of Transmittal



**Solicitation Name:** Immunization Information System  
**Solicitation Number:** CRFP MIS2600000001  
**Due Date:** 03/24/2026  
**Contracting Officer:** Crystal Hustead  
**Contracting Officer Email:** crystal.g.hustead@wv.gov  
**Contracting Officer Phone:** (304) 558-2402

RECEIVED  
2025 MAR 23 AM 11:19

**Company Name:** BenchLab Solutions  
**UEI / CAGE Code:** RS8HS92TH4S5 / 9WFD2  
**DUNS:** 062769713  
**SAM Registered Contact Name:** BenchLab, LLC, Patrick Barber, President  
**Address:** 13 Caroline Drive, Middletown, MD 21769  
**Phone Number:** (301) 276-7978  
**Email Address:** [pbarber@benchlabsolutions.com](mailto:pbarber@benchlabsolutions.com)  
**Approximate Annual Gross Revenue:** \$2,000,000  
**Small Business Status:** SBE  
**Expected NAICS Codes:** 54151, 541511, 541512

*This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed - in whole or in part - for any purpose other than to evaluate this proposal. If, however, a contract is awarded to **BenchLab, LLC** as a result of - or in connection with -- the submission of this data, the Government shall have the right to duplicate use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained on all sheets in this volume.*

Transmittal Letter  
March 24, 2026

Ms. Crystal G. Husted  
Dept. of Administration, Purchasing Division  
2019 Washington Street  
East Charleston, WV 25305

Re: Solicitation CRFP MIS2600000001 - Immunization Information System

Dear Ms. Husted,

On behalf of BenchLab Solutions, I am pleased to submit our proposal in response to Solicitation Number CRFP MIS2600000001 - Immunization Information System.

BenchLab Solutions is a scientific solutions-based company centered upon providing solutions for science and health based spaces with focus on addressing the challenges encountered in these domains. Our staff have, on average, 15 years of experience providing data management information systems expertise and services to agencies and private sector clients.

Our core competencies include:

- Cradle to grave delivery to clients
- Extensive experience and understanding of domain-specific workflows
- Managed Services including Project Management, Business Analysis, Quality Assurance

For this technical proposal, we provide information including:

- Technical narrative
- Proposed Solution
- Project Approach

We are confident that our expertise and approach make us an ideal future partner for this endeavor. Our response demonstrates how we will meet and exceed the requirements outlined for West Virginia.

Thank you for your consideration.

Sincerely,

Patrick Barber, PhD  
President – BenchLab Solutions

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## Executive Summary

### Company Background

BenchLab LLC is headquartered in Middletown, Maryland. Established in 2024 with team members who, on average, have 15 years of experience in developing and implementing document and information management systems for health, research, and state municipalities.

BenchLab is a small business currently employing 25 team members in the US and Canada. We are driven by the desire to help our clients set up, maintain, and support their data, in addition to ensuring our solutions provide real-time, easy-access to the data.

### Proposal Overview

BenchLab LLC proposes **BlueLot** as a purpose-built IIS solution for West Virginia. Our approach combines immediate operational capabilities with strategic development toward comprehensive CDC IIS Functional Standards compliance.

Unlike traditional IIS vendors offering pre-packaged solutions, BenchLab commits to developing functionality specifically tailored to West Virginia's unique requirements, ensuring every feature directly supports your public health mission.

### Key Differentiators

- Purpose Built Development: IIS functionality designed exclusively for WV needs
- Proven Foundation: Operational patient portals and data management delivering immediate value
- Compliance: Extensive experience translating to CDC standards

### Phased Implementation

Phase	Key Deliverables
Phase 1 (Months 0-3)	Foundation & Core Data Management: Deploy patient portal, notifications, core reporting. Establish governance and training.
Phase 2 (Months 4-6)	IIS Core Development: Implement immunization data models, HL7 messaging
Phase 3 (Months 7-9)	CDC Standards alignment: Achieve functional standards, compliance
Phase 4 (Months 10-12)	Advanced features: Population health analytics, reminder/recall automation, data exchange



## Section 2: Understanding of Requirements

### Current State

West Virginia recognizes the need for system modernization to better align with evolving CDC IIS Functional Standards, enhance interoperability with healthcare information systems, improve data quality and completeness, and provide advanced decision support capabilities for providers and public health practitioners. The state seeks a solution that not only meets current operational requirements but also positions West Virginia for future public health challenges and federal initiatives.

### West Virginia Immunization Program Goals

BenchLab understands that West Virginia's immunization program pursues multiple interconnected objectives:

- Improve Vaccination Coverage Rates
- Enhance Provider Engagement and Data Quality
- Support Public Health Surveillance and Response
- Ensure Regulatory Compliance and Federal Alignment
- Empower Patients and Families

### Understanding of CDC IIS Functional Standards

We understand that demonstrating alignment with CDC goals and readiness for future federal initiatives strengthens West Virginia's immunization infrastructure.

The 12 major functional areas that incorporates the CDC IIS Standards are:

Functional Area	BenchLab Understanding
<b>1. Locate Records</b>	Find patient immunization records using multiple identifiers and matching algorithms to consolidate fragmented data
<b>2. Create Records</b>	Capture new patient demographics and vaccination events through user interfaces and electronic data exchange
<b>3. Update Records</b>	Modify existing patient and vaccination data to correct errors, add missing information, or reflect status changes

<b>4. Delete Records</b>	Remove erroneous data while maintaining audit trails and data integrity safeguards
<b>5. Query and Reporting</b>	Generate coverage assessments, data quality metrics, provider performance reports, and customized analytics
<b>6. Data Exchange</b>	Exchange immunization data electronically using HL7 v2.5.1 messaging standards with bidirectional communication
<b>7. Decision Support</b>	Provide vaccine forecasting and recommendations based on ACIP schedules, patient history, and clinical factors
<b>8. Vaccine Management</b>	Track publicly funded vaccine inventory and support VFC program administration including ordering and accountability
<b>9. Provider Management</b>	Maintain healthcare provider and organization information including enrollment status, contact details, and program participation
<b>10. Security/Confidentiality</b>	Protect personal health information through encryption, access controls, audit logging, and compliance with HIPAA and state regulations
<b>11. Data Quality</b>	Ensure accuracy, completeness, validity, and timeliness through automated validation, deduplication, and quality monitoring
<b>12. Reminder/Recall</b>	Generate and distribute notifications to patients, parents, and providers for due and overdue vaccinations

BenchLab’s approach will address each functional area through a combination of **Bluelot’s** existing capabilities and development.

### **AIRA Interoperability Requirements**

BenchLab understands that American Immunization Registry Association (AIRA) certification, while not mandatory for initial contract award, represents a critical milestone for West Virginia's IIS modernization. Certification ensures the system can effectively communicate with diverse healthcare information systems including EHRs from major vendors (Epic, Cerner, Allscripts),

pharmacy management systems, and public health surveillance platforms. This interoperability reduces provider burden, improves data quality, and positions West Virginia for participation in national immunization data exchange initiatives.

**BenchLab commits to pursuing AIRA certification as a core component of our implementation plan.** Our Phase 3 development activities specifically target AIRA requirements, with formal testing scheduled for Month 16 and certification expected by Month 18 of the project timeline. This commitment demonstrates our dedication to meeting nationally recognized interoperability standards and ensuring West Virginia's IIS can effectively participate in health information exchange networks.

### **Public Health Data Management Challenges**

BenchLab recognizes the unique challenges inherent in public health data management that distinguish immunization information systems from other healthcare IT solutions:

- Data Completeness and Timeliness
- Data Quality and Standardization
- Privacy and Security Balance
- System Scalability and Performance

Managing nearly 32 million vaccination records for approximately 3 million patients, while supporting over 14,000 possible concurrent users demands a robust technical architecture and performance. BlueLot's cloud-based infrastructure provides the scalability to accommodate peak loads of vaccination campaigns.

### **Integration and Interoperability**

BenchLab recognizes the importance of operating within a complex ecosystem of healthcare and public health information systems such as:

- EHR systems
- Pharmacy Management systems
- Federal Public Health systems
- State Health Information exchange

### **BenchLab's Commitment to Partnership**

BenchLab views this engagement as a long-term partnership investment in West Virginia's public health infrastructure. Our success depends upon West Virginia's success. We plan to achieve this by:

- Transparent communication regarding capabilities, timelines, and challenges
- Continuous stakeholder engagement through development and implementation
- Direct expertise specifically targeted towards the project
- Dedication of BenchLab leadership attention and oversight

### **Section 3: Technical Approach**

#### **BenchLab's Approach**

Leveraging our extensive experience in developing and implementing Laboratory Information Management Systems, BenchLab LLC offers solutions that integrate and interface seamlessly with existing systems and processes to streamline data tracking, management, and reporting; providing clients with the tools they need to improve accuracy, productivity, and decision-making.

With a focus on customization and user support, BenchLab LLC ensures that each solution is tailored to the unique needs of our clients, backed by training and ongoing technical support to maximize the system's potential.

Our staff includes Software Developers, Project Managers, and Business Analysts - all of whom have received formal degrees in a scientific field (Chemistry, Biology, etc), and/or Computer Science, and Information Systems. Additionally, our staff specialize in scientific information systems used in Laboratory, Health, Clinical, and Research spaces.

#### **Proposed Solution**

BenchLab recommends using BlueLot for the proposed solution. BlueLot is a configurable IIS which was developed by BenchLab LLC to be fully customizable to provide ONLY the features that the client needs for their operation without the clutter of modules or features that the client does not need.

Further technical details of the BlueLot data management system are provided in a later section of this proposal.

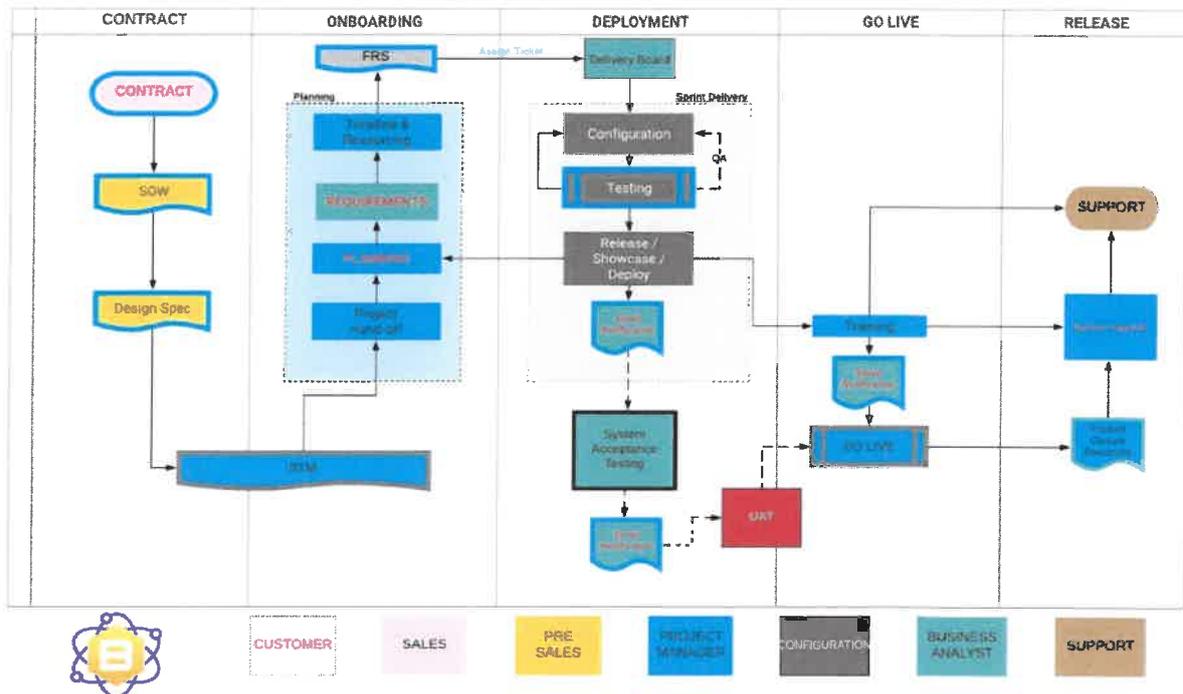
## **Proposed Plan**

BenchLab LLC's proposed plan uses a methodical, software development best practices approach to each software implementation. We have successfully applied this approach in all similar engagements to our client's satisfaction.

The proposed plan is as follows:

1. **Identify Business Stakeholders**
  - BenchLab LLC will begin by identifying the key stakeholders, such as administrators, the IT department, users, the finance department for budgeting, and the training department for collaboration with training personnel.
2. **Interview to Determine Business Case**
  - BenchLab LLC will conduct interviews with stakeholders using proper documentation to analyze their needs, pain points, and vision for the system.
3. **Identify Subject Matter Experts**
  - BenchLab LLC will identify the SMEs, such as the specific users, IT specialists and other relevant personnel who can provide insight into the technical requirements.
4. **Project Timeline and Project Plan**
  - BenchLab LLC will provide a Project Timeline and Plan for review and approval.
5. **User Requirements & Functional Requirements**
  - BenchLab LLC will create a User Requirements Specification (URS) based on the requirements listed in the solicitation. The user requirements are then translated into a Functional Requirements Specification (FRS). Functional Requirements detail what the system should do and how it should behave under certain conditions. The FRS describes the specific functionalities or behaviors that a system must perform to satisfy user needs, business requirements, and stakeholder expectations.
6. **Gap Analysis of Processes**
  - BenchLab LLC will identify gaps, if any, between current processes and desired functionalities outlined in the URS and present the findings, obtain feedback, and finalize the gap analysis document.
7. **Establish Project Team, Project Delivery Process, and Training**
  - BenchLab LLC will conduct training sessions for project team members and end-users on the new Solution. Additionally, we will assign roles including the project manager, business analyst, and SMEs responsible for different aspects of the project.
8. **Create Project Plan and Project Delivery Documents**
  - BenchLab LLC will develop a comprehensive project plan that outlines tasks, timelines, milestones, and responsibilities.

- BenchLab LLC will work with our client to help define required resources to create an approved RACI (Responsible-Accountable-Consulted-Informed) Matrix

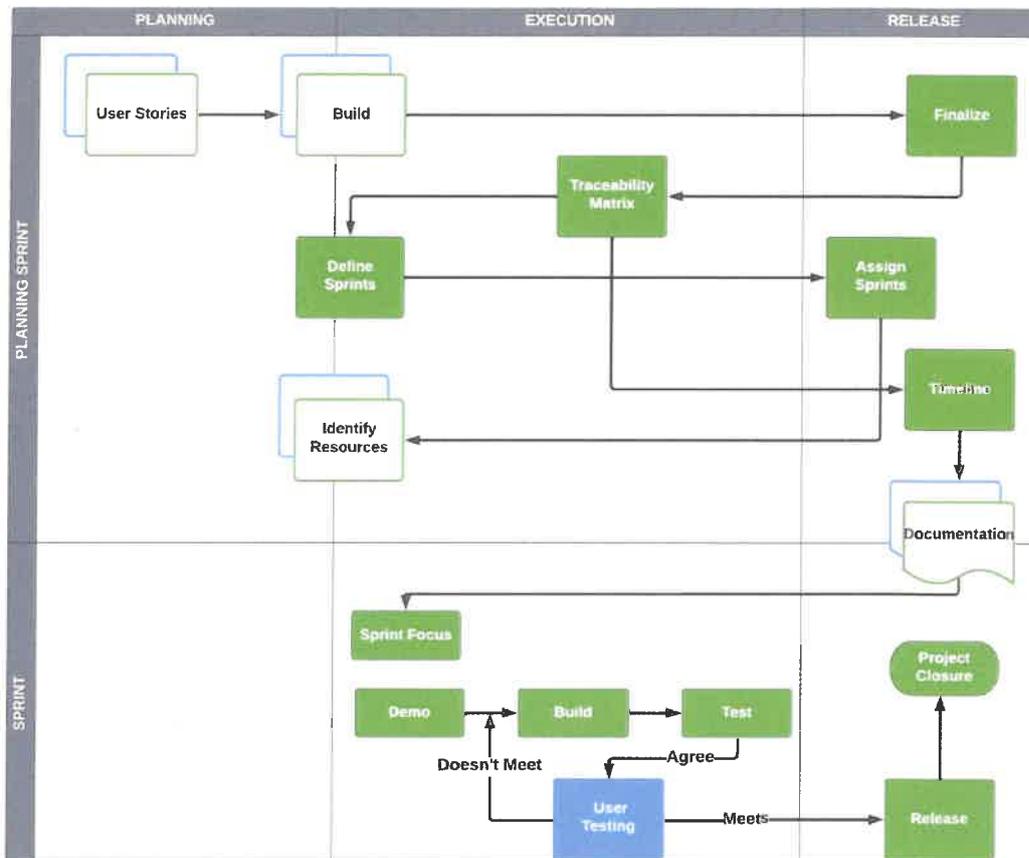


## 9. Implementation Plan

- Document User Requirements Specification (URS)
- Document Functional Requirements Specification (FRS)
- Score Requirements inside Requirement Traceability Matrix
- Create Project Plan defining RACI, Timeline and Resources
- Create Sprint Plan (Agile Methodology listed below)
- Assign development tickets
- Schedule meeting occurrences
- Execute Scrum Development Protocols
- Build
- Demo
- User Test
- Release
- User Acceptance Testing (UAT) - Validation
- Software Testing and Verification Summary
- Training Plan
- Release Management Plan
- Support Plan
- Project Closure Documents
- Change Management Plan, if necessary

- BenchLab LLC will define the project scope, objectives, and the approach for implementation under the oversight of the client.
- Development is based on Agile Methodologies with bi-weekly or tri-weekly sprints.

## Agile Sprints



- BenchLab LLC will work alongside business SME's to assist with User Acceptance Testing
  - UAT findings will be captured in an Issue Tracker and addressed by the Development team. Bug fixes will be re-tested during the official testing phase.

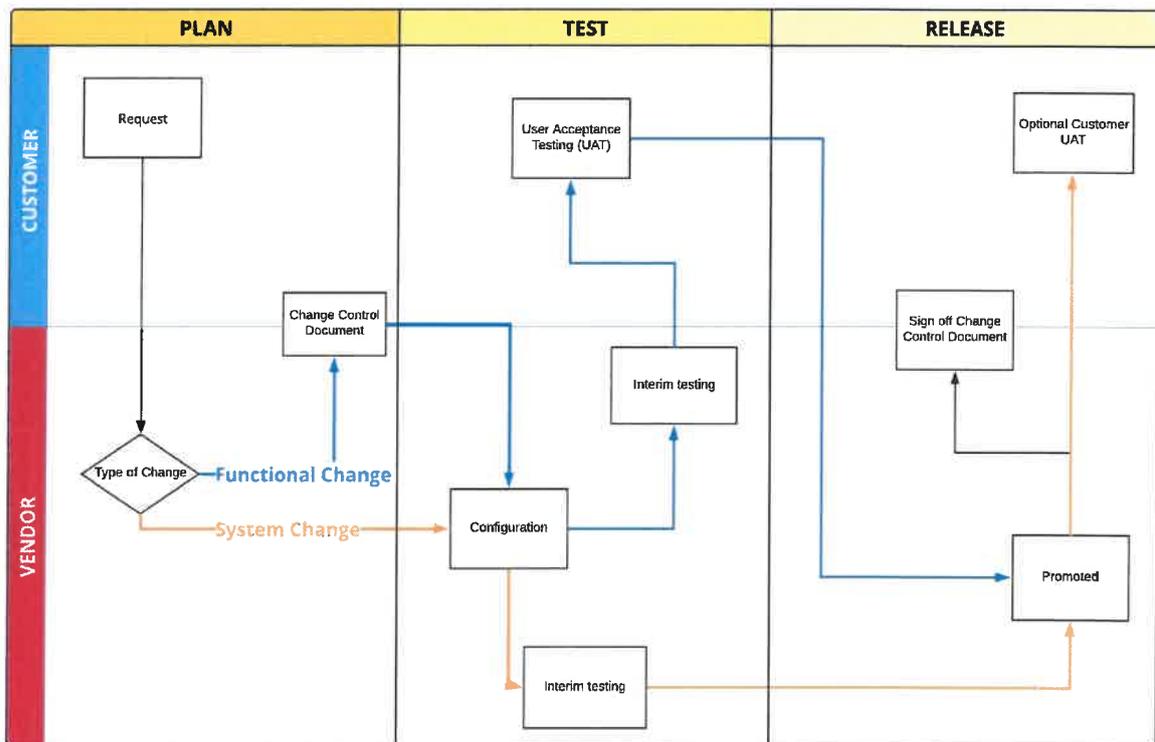
### 10. Testing & Validation Plan

- BenchLab LLC adheres to testing the functionality and performance of the Solution before full deployment.
- Testing and validation will be conducted midpoint and after all development has been completed.
- BenchLab LLC will create and execute test scripts per URS and FRS guidelines.

### 11. Go-Live Plan

- BenchLab LLC can develop a detailed plan for transitioning from the existing ways-of-working to the new Solution, including a contingency plan and rollback procedures. Additionally, BenchLab LLC will include a Business Continuity Plan to outline the procedures to ensure continuous operations during and after the transition.

## Change Control Process



### 12. Support Plan

- BenchLab LLC will establish a support framework including Helpdesk procedures, escalation paths, and ongoing maintenance schedules.

In addition to delivering a robust, tailored system, BenchLab LLC aims to provide professional services by fulfilling the system and licensing requirements, as well as providing all additional professional services, training, and software support. Our collaboration seeks to leverage BenchLab's expertise in innovative technology solutions that enhances our clients' operational efficiency.

## **Section 4: Implementation Plan and Timeline**

### **Project Management Approach**

BenchLab will utilize Agile Scrum methodology. This approach provides the West Virginia project team with regular visibility through:

- **2-week sprint cycles:** Development organized into two-week iterations with clear goals
- **Daily Stand-Up Meetings:** 15 minute daily coordination with development team
- **Sprint Planning:** Detailed planning defining specific work items
- **Sprint Demos:** Stakeholder demonstrations with completed functionality

A dedicated Project Manager with full-time assignment will manage all activities and will coordinate with the West Virginia Department of Health leadership, additionally, the Technical Lead will provide IIS solution architecture oversight and reporting.

### **Project Timeline**

BenchLab proposes a 9-12 month implementation in the four phases previously described. A finalized timeline will be determined after project scope completion. A summary is as follows:

- **Month 0-1:** Project kickoff, scoping, requirements gathering, environment setup
- **Months 0-3:** Core platform deployment, patient portal, basic reporting, training, Phase 1 go-live
- **Months 4-6:** Immunization data model, HL7 messaging, provider workflows, data migration, complete Phase 2
- **Months 7-9:** CDC standards compliance, AIRA certification pursuit, CDSi integration, complete Phase 3
- **Months 10-12:** Advanced analytics, optimization, closeout

### **Testing and Validation**

Comprehensive testing includes:

- Unit testing
- Integration testing
- System testing
- User Acceptance testing

## Section 5: Compliance Matrix

This compliance matrix provides responses to RFP Section 4.2 requirements, indicating current BlueLot IIS capabilities, development plans, and compliance phase.

Requirement	BenchLab Response
4.2.1.1.1 Secure IIS with Policies	<p><b>Current:</b> Role-based access control, audit logging, TLS encryption, MFA support, HIPAA security policies</p> <p><b>Development:</b> IIS-specific policies, consent management, SOC 2 Type II pursuit</p> <p><b>Phase:</b> Phase 1 (Month 3) core security; Phase 3 (Month 9) enhanced policies; Phase 4 (Month 12) SOC 2</p>
4.2.1.1.2 Technical Infrastructure	<p><b>Current:</b> Cloud architecture, elastic scalability, load balancing, automated backup/DR</p> <p><b>Development:</b> Size for WV scale (14k users, 32M records), performance optimization, capacity testing</p> <p><b>Phase:</b> Phase 1 (Month 3) infrastructure deployed; ongoing optimization</p>

BenchLab will abide by each deliverable as listed in Attachment I, as well as all provided attachments from the solicitation (Attachment A through I).

### CDC Based Goals

- Data Exchange (HL7): Implement HL7 immunization messaging per CDC Guide
- Decision Support: Phase 2 basic forecasting, Phase 3 CDC CDSi integration for ACIP compliant forecasting

## **Attachment B: Baseline IIS Requirements Compliance Response**

BenchLab LLC thoroughly reviewed the Requirements Traceability Matrix (RTM) in **Attachment B**. The comprehensive functional and non-functional requirements across 10 IIS functional areas will be addressed through a combination of current capabilities, planned configurations, and targeted development within our 9-12 month roadmap. **Please refer to the included attachments following this page.**

### **Approach**

- **Current Capabilities:** BlueLot's platform provides functionality for user management, data access/reporting, security controls, and administrative functions. These are production ready and can be aligned with West Virginia's specific requirements.
- **Platform Configuration:** BlueLot's architecture allows rapid adaptation to specific needs including immunization data models, vaccine code sets, VFC program tracking, and provided workflows.
- **Targeted Development:** Where gaps are identified, BenchLab can apply targeted development to address the issues.

### **BlueLot Key Strengths**

- **User Management & Access Control:** Comprehensive role based access control, multi-factor authentication, single sign-on integration, audit logging, and session management directly addresses Attachment B requirements
- **Data Access & Reporting:** BlueLot's flexible reporting engine, portal, dashboards, and multiple export formats provide strong foundation for IIS-specific coverage assessment, data quality and accountability reporting
- **Non-Functional Requirements:** BenchLab LLC applies rigorous security practices, HIPAA compliance framework, encryption standards, disaster recovery capabilities, and optimization meeting or exceeding Attachment B specifications.

### **Identified Gaps and Development**

Any identified gaps will be addressed through Phased development within the project timeline.

### **Compliance Summary**

BlueLot targets a phased approach that will provide IIS functionality, HL7 messaging, provider workflows, data migration, CDC compliance, AIRA certification pursuit, CDSi integration, and a complete system for West Virginia. BenchLab LLC commits to full transparency regarding the implementation approach and realistic timelines.

**Attachments and Supporting Documentation per  
Attachment B**

## **Section 6: Team Qualifications and Experience**

### **Company Background**

BenchLab LLC is a scientific solutions based company specializing in health information management systems for organizations operating in highly regulated environments. BenchLab combines deep regulatory compliance knowledge with modern software development expertise.

### **Company Information**

- Legal Name: BenchLab LLC
- Headquarters: 13 Caroline Drive, Middletown, MD 21769
- Phone: (301) 276-7978
- UEI: RS8HS92TH4S5, Cage Code: 9WFD2, DUNS: 062769713

### **Key Personnel**

Our project team combines BenchLab's regulatory and project management expertise with our operational capabilities:

#### **Patrick Barber, PhD - Project Executive & Advisor- West Virginia native**

- **Role:** 20+ years LIMS experience. Overall project oversight, regulatory compliance, quality assurance, LIMS/Software implementation Advisor

#### **David Jallad - Project Manager**

- **Role:** 15+ years software experience. Project management, Implementation, and organization

#### **Anthony Forte Jr - Senior Business Analyst - West Virginia native & resident**

- **Role:** Oversight, Requirements, and Validation. 30 years industry experience (microbiology, chemistry, compliance, software)

#### **Alex Bodine - Software Engineer Lead**

- **Role:** Integrations, configurations, software developer, 10+ years industry experience

#### **Gregory Barbe - Systems Administrator/Development**

- **Role:** LIMS integrations, configurations, software developer, 20+ years industry experience

## Section 7: References

<b>Name of the Company</b>	<b>Arcellx</b>
Location of Project	Gaithersburg, MD
POC Name & Title	Faith Griffin, Director
POC Email	fgriffin@arcellx.com
Your Role (Prime or Sub)	Prime
Project Dates	01/01/2024 - Present
Contractual Award	\$300,000
Were you Terminated from this Contract?	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	
Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services and project management for multiple LIMS and ELN products.	

<b>Name of the Company</b>	<b>Astellas</b>
Location of Project	Sanford, NC
POC Name & Title	Victor Lignes, Business Information Manager (MfgX)
POC Email	victor.lignes@astellas.com
Your Role (Prime or Sub)	Prime
Project Dates	10/01/2023 - 10/31/2025
Contractual Award	\$950,000
Were you Terminated from this Contract?	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	

LIMS/ELN Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services, technical writing, reports development, validation for multiple domains within a global company.

<b>Name of the Company</b>	<b>Certified Group</b>
Location of Project	Burbank, CA
POC Name & Title	Jennifer Sawkins, Vice President
POC Email	jennifer.sawkins@certifiedgroup.com
Your Role (Prime or Sub)	Prime
Project Dates	12/01/2023 - 04/04/2025
Contractual Award	\$780,000
Were you Terminated from this Contract?	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	
LIMS/ELN Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services, technical writing and project management within a global company.	

<b>Name of the Company</b>	<b>Solvias</b>
Location of Project	North Carolina
POC Name & Title	Erika Gill
POC Email	erika.gill@solvias.com
Your Role (Prime or Sub)	Sub
Project Dates	01/02/2025 - current
Contractual Award	\$597,000
Were you Terminated from this Contract?	No

<b>Narrative Description of General Scope of Project / Other than Management:</b>
LIMS and ELN implementation, Global Project Management, QMS support, Standards & Reagents Inventory Manager (SRIM), Project Sample Management Process, Equipment Visual Workflow, Investigations, Stability Module, Data Trending- including a custom Stability Shelflife Regression tool and NWA Charting. Additionally, BenchLab is performing Gap Assessments, Documentation (SOPS, Work Instructions, Qualification Protocols, and additional supporting documentation), and Change Control.

<b>Name of the Company</b>	<b>Safe Food Alliance</b>
<b>Location of Project</b>	Kingsburg, California
<b>POC Name &amp; Title</b>	Derek Ramirez
<b>POC Email</b>	derekr@safefoodalliance.com
<b>Your Role (Prime or Sub)</b>	Prime
<b>Project Dates</b>	July 2025- Present
<b>Contractual Award</b>	\$362,900
<b>Were you Terminated from this Contract?</b>	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	
Managed services and various services.	



## **Representations and Certifications**

### **52.212-3 Offeror Representations and Certifications--Commercial Products and Commercial Services (NOV 2023)**

The offeror has completed the annual representations and certifications electronically via the SAM website accessed through <https://www.sam.gov>. After reviewing the SAM database information, the offeror verifies by submission of this offer that the representation and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications—Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), as of the date of this offer and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs N/A.

(End of provision)

### **52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment (Nov 2024)**

(d) Representations. The Offeror represents that—

(1) It  will,  will not provide covered telecommunications equipment or services to the Government in the performance of any contract, subcontract or other contractual instrument resulting from this solicitation. The Offeror shall provide the additional disclosure information required at paragraph (e)(1) of this section if the Offeror responds "will" in paragraph (d)(1) of this section; and

(2) After conducting a reasonable inquiry, for purposes of this representation, the Offeror represents that—

It  does,  does not use covered telecommunications equipment or services, or use any equipment, system, or service that uses covered telecommunications equipment or services. The Offeror shall provide the additional disclosure information required at paragraph (e)(2) of this section if the Offeror responds "does" in paragraph (d)(2) of this section.

(End of provision)

### **52.204-26 Covered Telecommunications Equipment or Services--Representation (OCT 2020)**

(c) Representations.

(1) The Offeror represents that it  does,  does not provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

(2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it  does,  does not use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

(End of provision)

**Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law (Feb 2016)**

(a) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that—

(1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

(2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.

(b) The Offeror represents that—

(1) It is  is not  a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and

(2) It is  is not  a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

Patrick Barber,  
President, BenchLab LLC  
Office: (301) 276-5314  
Email: [pbarber@benchlabsolutions.com](mailto:pbarber@benchlabsolutions.com)

Req. #	Capability	Requirement: The IIS must/should...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, No with customization*, No *	Comment required
	Hierarchy	ability to establish the IIS hierarchy to associate and manage relationships between entities			E	Yes with configuration	
	Hierarchy	ability to associate users to a facility			E	Yes with configuration	
	Hierarchy	ability to associate clinicians to a facility			E	Yes with configuration	
	Hierarchy	ability to associate facility/facilities to an organization			E	Yes with configuration	
	Hierarchy	ability to establish geographic jurisdictional hierarchy			E	Yes with configuration	
	Hierarchy	ability to aggregate data across user-defined hierarchies			E	Yes with configuration	
	System Configuration	ability to maintain inventory availability in IIS visible to authorized users			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to maintain separate VFC supplied inventory in the IIS			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to maintain separate jurisdiction supplied inventory			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to maintain separate private stock inventory			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to manage code sets			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to update NDC codes			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to update CVX codes			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to update MX codes			E	Yes with configuration	
	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 complete			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., SmartyStreets)			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., LexisNexis)			O	Yes	
	System Configuration	ability for jurisdictional admin to modify facility types according to Immunization program descriptions and CDC VFC Program descriptions			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to configure rules governing data validation of incoming HL7 messages			E	Yes with configuration	
	System Configuration	ability to configure an authorization agreement as per jurisdictional policy			O	Yes with configuration	
	System Configuration	ability to configure user agreement as per jurisdictional policy			O	Yes with configuration	
	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 with configuration	
	System Configuration	ability to add patient priority group indicators		Partic	E	Yes with configuration	
	System Configuration	ability to modify patient priority group indicators		Partic	E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to manage business rules related to data quality			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to specify business rules for monitoring data quality			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to modify business rules for monitoring data quality			E	Yes with configuration	
	System Configuration	ability to configure the organization enrollment form			E	Yes with configuration	
	System Configuration	support rules-based logic to suggest approval or rejection of enrollment form based on review of completed fields			E	Yes	
	System Configuration	ability to manage rules-based logic for approval or rejection of enrollment form			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to create enrollment forms based on program requirements			E	Yes with configuration	
	System Configuration	ability for jurisdictional admin to modify an enrollment form			E	Yes with configuration	
	System Configuration	ability to auto-populate existing user information in the IIS with the information on the enrollment form when creating a new facility in the IIS			O	Yes with configuration	
	System Configuration	ability to auto-populate the organization information in the IIS with information on the enrollment form when creating a new organization in the IIS			O	Yes with configuration	
	System Configuration	ability for jurisdictional admin to configure vaccine forecasting business rules			E	Yes with configuration	
	System Configuration	ability to apply effective dates to vaccine rules			O	Yes with configuration	
	System Configuration	ability to incorporate new vaccines per ACIP into the forecasting algorithm			E	Yes with configuration	
	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 jurisdictional policy			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.g., address, phone number, mother's maiden name, Medicaid ID			E	Yes with configuration	
	System Configuration	ability to open multiple screens simultaneously within the application			O	Yes with configuration	
	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 attributes			E	Yes	
	System Alerts	ability for jurisdictional admin to manage system alerts			E	Yes with configuration	
	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 application			O	Yes	
	System Alerts	ability for jurisdictional admin to add global messages			E	Yes with configuration	
	System Alerts	ability for jurisdictional admin to edit global messages			E	Yes with configuration	
	System Alerts	ability for jurisdictional admin to inactivate global messages			E	Yes with configuration	

Vendor comment(s)
If Yes with customization, indicate the anticipated cost and timeline for development and release.
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
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Vaccine inventory management will be configured to track receipts, doses, and wastage by facility and funding source. Cost: Included, Timeline: Month 6-8
VFC inventory tracking will be configured with separate bins and automated reconciliation reporting. Cost: Included, Timeline: Month 6-8
Vaccine inventory management will be configured to track receipts, doses, and wastage by facility and funding source. Cost: Included, Timeline: Month 6-8
Vaccine inventory management will be configured to track receipts, doses, and wastage by facility and funding source. Cost: Included, Timeline: Month 6-8
Vaccine code management will be configured with automated CDC table synchronization and version tracking. Cost: Included, Timeline: Month 2-3
NDC management will be configured with automated CDC table synchronization and version tracking. Cost: Included, Timeline: Month 2-3
CVX management will be configured with automated CDC table synchronization and version tracking. Cost: Included, Timeline: Month 2-3
MX management will be configured with automated CDC table synchronization and version tracking. Cost: Included, Timeline: Month 2-3
BlueDot supports configurable defaults at global, facility, and user levels.
BlueDot displays context-specific error messages with suggested corrections.
BlueDot implements USPS address standardization and validation via integrated third-party service.
BlueDot implements USPS address standardization and validation via integrated third-party service.
BlueDot provides geocoding generating latitude/longitude coordinates for geographic analysis.
BlueDot implements USPS address standardization and validation via integrated third-party service.
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
HL7 v2.5.1 immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS message will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
BlueDot provides this capability through its comprehensive platform features.
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
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BlueDot provides this capability through its comprehensive platform features.
BlueDot provides this capability through its comprehensive platform features.
BlueDot provides patient search with multi-criteria options including name matching (exact/soundex), DOB, identifiers, and demographics.
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot supports full user account creation with demographics, credentials, role assignments, and facility associations.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
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This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
BlueDot provides this capability through its comprehensive platform features.
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This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6
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This capability will be configured during implementation to meet IS requirements. Cost: Included, Timeline: Month 4-6

Status	Req. #	Capability	Requirement: The IS must/should have...	Reviewer notes	Priority: E, O (see ital, optional)	Vendor response: Yes, Yes with customization*, No *Comments required
		Organization/Facility	ability to search organization/facility information stored in the IS		E	Yes
		Organization/facility	ability for jurisdictional admin to search organizations/facilities by user-defined parameters		E	Yes
		Organization/facility	ability to clear and re-enter search criteria when searching for an organization/facility		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized (non-participating/enrolled) organization to enroll electronically for participation in the IS		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized organization to add IS enrollment information online		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized org to submit IS enrollment information online		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized org to save partially complete IS enrollment information		O	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized org to return to a partially complete IS enrollment information		O	Yes
		Add, Edit, Inactivate	ability to prevent submission of incomplete IS enrollment information when required field(s) are missing		E	Yes
		Add, Edit, Inactivate	ability to electronically notify the applicant of incomplete IS enrollment information specifying the missing required fields		E	Yes
		Add, Edit, Inactivate	ability to electronically notify applicant that IS enrollment information has been submitted		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized org to edit rejected IS enrollment information		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized org to resubmit a rejected IS enrollment		E	Yes
		Add, Edit, Inactivate	ability to capture electronic signature for enrollment, for an authorization agreement		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to manage organization/facility IS enrollment		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to manage organization/facility IS enrollment status		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to deactivate an organization		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to deactivate an organization		E	Yes
		Add, Edit, Inactivate	ability to store IS enrollment status for an organization/facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to deactivate a facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to reactivate a facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to electronically approve IS enrollment		E	Yes
		Add, Edit, Inactivate	ability to include reason for rejecting IS enrollment of an organization		E	Yes
		Add, Edit, Inactivate	ability to electronically notify the organization that the submitted enrollment was reentered along with the reason		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to manage organization and facility records within the IS		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to add an organization		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to modify an organization record		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to add a facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to modify a facility record		E	Yes
		Add, Edit, Inactivate	ability to automatically generate unique facility IS ID		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to associate a facility to an organization		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to edit association between a facility and organization		E	Yes
		Add, Edit, Inactivate	ability to store multiple unique facility site IDs associated with a particular facility (to facilitate matching of facilities between the IS and other data systems)		E	Yes
		Add, Edit, Inactivate	ability to capture a facility's mailing address		E	Yes
		Add, Edit, Inactivate	ability to capture a facility's shipping address		E	Yes
		Add, Edit, Inactivate	ability to enter contact information for the facility contact		E	Yes
		Add, Edit, Inactivate	ability to enter contact information for an optional contact		E	Yes
		Add, Edit, Inactivate	ability to indicate if an organization/facility is a site where immunizations are administered		E	Yes
		Add, Edit, Inactivate	ability to indicate if an organization/facility is a site where vaccines are stored for redistribution		O	Yes
		Add, Edit, Inactivate	ability to save documents (e.g., enrollment log/online documents, storage and handling, borrowing, temperature logs, wastage, etc.) to specific organization/facility file folder per policy		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to retrieve electronic files from provider file folder		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to record notes related to an organization/facility		E	Yes
		Add, Edit, Inactivate	ability to flag an organization as participating in VFC and/or other user-defined vaccine program(s)		E	Yes with configuration
		Add, Edit, Inactivate	ability to retrieve organization/facility information from scanned forms and automatically fill required data fields with retrieved information		O	Yes
		VFC/Vaccine Program	ability for an organization to submit vaccine program enrollment information electronically		E	Yes with configuration
		VFC/Vaccine Program	ability to capture electronic signature for vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to access the vaccine program agreement in a separate window from the vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to provide link to the blank formatted vaccine program enrollment form		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to assign a VFC pin number to a newly enrolled VFC site		E	Yes with configuration
		VFC/Vaccine Program	ability to select the type of certified monitoring device being used to record temperatures		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that a facility has a certificate of calibration for the temperature monitoring device		O	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to approve a vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to enter an expiration date for a vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that the vaccine program facility has a routine and emergency vaccine management plan		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that a facility participating in VFC has a VFC Coordinator annual training certificate		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that a facility participating in VFC has a Backup Coordinator annual training certificate		E	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to add comments during the vaccine program enrollment approval process		O	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to indicate the number of vaccine storage units being monitored		O	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to indicate the type of vaccine storage units being monitored		O	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to indicate whether they store Varicella and MMV vaccine		E	Yes with configuration
		VFC/Vaccine Program	ability to enter contact information for the facility Primary Vaccine Coordinator		E	Yes with configuration
		VFC/Vaccine Program	ability to enter contact information for the facility Backup Vaccine Coordinator		E	Yes with configuration
		VFC/Vaccine Program	ability to enter contact information for the facility vaccine program Agreement Signatory		E	Yes with configuration
		VFC/Vaccine Program	ability to capture the day of the week that a vaccine program facility may receive vaccine shipments		E	Yes with configuration
		VFC/Vaccine Program	ability to capture the time that a vaccine program facility may receive vaccine shipments		E	Yes with configuration
Updated		VFC/Vaccine Program	ability to automatically turn off vaccine ordering capabilities for a facility that does not have an up-to-date vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to capture required information for VFC clinician (last name, first name, ID#, medical license number, NPI number, still active with facility, are they a signatory, specialty (if, ped) during the enrollment process		E	Yes with configuration
		VFC/Vaccine Program	ability to attach VFC documentation in multiple formats (such as VFC training certification, certificate of calibration, medical license, floor design diagram and other documents)		O	Yes with configuration
		VFC/Vaccine Program	ability for IS staff to retrieve electronic files from organization/facility file folder		O	Yes with configuration
		VFC/Vaccine Program	ability to automatically validate clinician license number against Professional Licensing Agency record database		O	Yes with configuration
		VFC/Vaccine Program	ability to submit vaccine program re-enrollment data electronically		E	Yes with configuration
		VFC/Vaccine Program	ability to electronically notify a facility VFC/vaccine program coordinator of an upcoming need for VFC/vaccine program re-enrollment		O	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to modify the date for online renewal electronic notifications for each vaccine program facility		E	Yes with configuration
		VFC/Vaccine Program	ability to suspend ordering capabilities for a facility pending approval of vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to re-activate ordering capabilities for a facility when a vaccine program enrollment is approved		E	Yes with configuration
		Organization/Facility	ability to send electronic communications to organization/facility contacts		E	Yes with configuration
		Organization/Facility	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	ability to send electronic communications direct from the IS		E	Yes with configuration
		Organization/Facility	ability to send electronic communications direct from the IS to multiple recipients		O	Yes
		Organization/Facility	ability to notify more than one user at a participating vaccine program facility of any vaccine program notification		O	Yes
		Organization/Facility	ability for the jurisdictional vaccine program admin to customize vaccine program enrollment alerts to participating vaccine program facilities when needed		O	Yes
		Organization/Facility	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	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



Status	Req. #	Capability	Requirement: The IS mod/control here...	Comments	Reviewer notes	Priority: 5, 0 (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required
		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
		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			E	Yes
		Add, Edit, Inactivate User	ability for admin to manage user accounts			O	Yes
Added		Add, Edit, Inactivate User	ability to track the progress of a new user registration			E	Yes with configuration
		Add, Edit, Inactivate User	ability for admin to add new users			O	Yes with configuration
		Add, Edit, Inactivate User	ability for admin to modify user accounts			E	Yes with configuration
		Add, Edit, Inactivate User	ability for admin to Inactivate user accounts			E	Yes with configuration
		Add, Edit, Inactivate User	ability for jurisdictional admin to Inactivate multiple accounts in one transaction			E	Yes with configuration
		Add, Edit, Inactivate User	ability for organization admin to Inactivate user accounts associated with their organization			O	Yes with configuration
		Add, Edit, Inactivate User	ability to store reason for Inactivation of user account			E	Yes with configuration
		Add, Edit, Inactivate User	ability for jurisdictional admin to reactivate an Inactivated account			E	Yes with configuration
		Add, Edit, Inactivate User	ability to electronically notify a user that their account is locked (inaccessible as per jurisdictional security policy)			O	Yes with configuration
		Add, Edit, Inactivate User	ability to electronically notify a user that their account is inactive			O	Yes with configuration
		Add, Edit, Inactivate User	capture clinician activity status (out of state, loss of certification, change of practice status, other)			O	Yes with configuration
		Add, Edit, Inactivate User	ability for jurisdictional admin to assign a role to authorized users			E	Yes with configuration
		Add, Edit, Inactivate User	ability for organization admin to assign a role to authorized users within their organization			E	Yes with configuration
		Authentication & Authorization	ability to authenticate user			E	Yes with configuration
		Authentication & Authorization	ability to access the system through an authorized username and password			E	Yes with configuration
		Authentication & Authorization	ability to support access via single sign in for jurisdictional users			O	Yes with configuration
		Authentication & Authorization	ability to switch between multiple organizations			O	Yes with configuration
		Authentication & Authorization	ability to view jurisdictional policy agreements			E	Yes
		Authentication & Authorization	support multi-factor authentication per jurisdictional policy			E	Yes
		Password Management	ability to generate electronic notification to authorized user of account credentials			O	Yes with configuration
		Password Management	ability to electronically notify authorized users of their username			E	Yes with configuration
		Password Management	ability to electronically notify authorized users of their temporary password in a separate notification			E	Yes with configuration
		Password Management	ability to generate electronic notification at periodic intervals to authorized users of their pending account password expiration			E	Yes with configuration
		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 with configuration
		Password Management	ability to support temporary password which will be required to change during initial log in			E	Yes with configuration
		Password Management	ability to support temporary password which will expire in X number of days determined by policy			E	Yes with configuration
		Password Management	ability for users to change their own passwords per program/jurisdiction security policy			E	Yes with configuration
		Password Management	ability for users to reset their password per program/jurisdiction security policy			E	Yes with configuration
		Password Management	ability to prompt users to change their password at time intervals per program/jurisdiction security policy			E	Yes with configuration



Status	Req. #	Capability	Requirement: The IS must/shoud have	Comments	Reviewer notes	Priority: E-O (essential, optional)	Vendor response: Yes, Yes with customization*, No	Vendor comments (if Yes with customization, indicate the anticipated cost and timeline for development and release)
		Onboarding	ability to onboard organizations/facilities to facilitate remote data exchange			E	Yes with configuration	Provide onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Onboarding	ability to track an organization/facility's progress through the onboarding process			O	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Onboarding	ability to capture EHR system specification details			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Onboarding	ability to create a unique username to assign to the organization/facilities during the test phase			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Onboarding	ability to create a unique password to assign to the organization/facilities during the test phase			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		Onboarding	ability to store digital certificate information			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		Onboarding	ability to electronically alert the vendor/organization when the certificate for transport is going to expire in 30 time period			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Onboarding	ability to validate that the transport layer between the test site and IIS is functional			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Onboarding	ability to validate system connectivity prior to the submission of test data			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Onboarding	ability to identify data formatting errors during testing			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		Onboarding	ability to provide test message submission summary report to the EHR vendor			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		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 with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Onboarding	ability for IS staff to review and reject onboarding forms			E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Onboarding	ability for applicant to edit a rejected onboarding application			E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Onboarding	ability for applicant to save a rejected onboarding application			E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Onboarding	ability for applicant to resubmit a rejected onboarding application			E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Onboarding	ability to compare onboarding application information to current records to determine most current data			E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
		Interfaces	ability to interface with other systems to facilitate electronic data sharing/exchange per jurisdictional policy			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to interface with electronic health records systems			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to interface with the Immunization Gateway			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		Interfaces	ability to interface with an application that facilitates patient scheduling	Particularly		E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to exchange data with CDC Vaccine Tracking System (VTrckS) based on most current CDC ExtS Specifications			E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
		Interfaces	ability to order vaccine via electronic interface with VTrckS			E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Updated		Interfaces	ability to receive vaccine inventory/shipping information			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		Interfaces	ability to batch export vaccine inventory for submission to VTrckS			E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
		Interfaces	ability to batch export vaccine ordering information for submission to VTrckS			E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
		Interfaces	ability to batch export facility information			E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
		Interfaces	ability to export vaccine return and wastage data to VTrckS			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Added		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 with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
		Interfaces	ability to receive data through an interface with jurisdictional vital records system			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to update IIS data from Vital Records for birth events			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to update IIS data from Vital Records for death events			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to update IIS data from Vital Records for adoption events			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to update IIS data from Vital Records for name change events			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to detect if a newborn record is a potential duplicate in the IIS			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to use new Vital Record data for matched records to update patient demographic data			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to update the IIS with date of death from Vital Records data			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to prevent updates to IIS records			O	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Interfaces	ability to support real-time data exchange per the CDC HL7 implementation guide			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to process an HL7 message			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to respond to an HL7 message			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to create an HL7 message			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to capture IIS Core Data Elements			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to store IIS Core Data Elements			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
Updated		Data Exchange	ability to accept last prior version of HL7 messages	In the event a new HL7		E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to manually correct a submitted record and resubmit for processing			O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to support data exchange in non-HL7 format			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to import bulk patient demographic information into IIS	Particularly		E	Yes	BlueDot manages comprehensive demographics including name, DOB, gender, race, ethnicity, address, and identifiers.
Added		Data Exchange	ability to import bulk immunization information into IIS	Particularly		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
Added		Data Exchange	ability to export routine, seasonal, and emergency vaccination files (age, age and de-identified)			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to monitor and troubleshoot data exchange			O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to view VU/I messages submitted by an organization			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to view HL7 ACK messages for an organization within a defined date range per jurisdictional policy			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to view HL7 ACK messages generated for an organization			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to view incoming HL7 CBP messages submitted by an organization			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to view PSP messages generated for an organization			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IIS messages will be added.
		Data Exchange	ability to log acknowledgment messages indicating receipt and errors			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
		Data Exchange	ability to retrieve error messages within a specified date range by organization			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to retrieve acknowledged messages within a specified date range by organization			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Data Exchange	ability to filter error messages			E	Yes	BlueDot displays context-specific error messages with suggested corrections.
		Data Exchange	ability to filter acknowledgment messages			E	Yes	BlueDot provides this capability through its comprehensive platform features.
		Data Exchange	ability to sort error messages			E	Yes	BlueDot displays context-specific error messages with suggested corrections.
		Data Exchange	ability to sort acknowledgment messages			E	Yes	BlueDot provides this capability through its comprehensive platform features.

Status	Req. #	Capability	Requirement: The IIS must/should have...	Comments	Reviewer notes	Priority: F, O (essential, optional)	Vendor response: Yes, Yes with customization, No *Comment required	Vendor comment(s)
		Patient Matching & Deduplication	ability to prevent duplicate patient records in the IIS database			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to automatically identify incoming patient records as potential duplicates			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to automatically identify existing patient records as potential duplicates			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to automatically consolidate two or more duplicate records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to generate electronic notification of potential duplicates for manual review			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to automatically match an incoming patient record with existing records to avoid a duplicate record being created			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to set thresholds for patient matching			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to view all potential duplicate patient records for an individual patient simultaneously			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for jurisdictional admin to edit thresholds to increase the probability of a match			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for jurisdictional admin to edit thresholds to reduce the probability of a match			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to flag potential duplicate patient records for manual review that cannot be resolved automatically			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to view all potential duplicate patient records simultaneously			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for admin to manually merge patient records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for organizational facility user to manually merge patient records from their own organization/facility			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to manually flag two or more patient records as potential duplicates			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to prevent manual review of records previously indicated as "not a duplicate"			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to flag a patient as "not a duplicate" during manual review			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to maintain "not a duplicate" flag for resolved patient records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to select data elements from the patient records to maintain within the consolidated record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to retain "pre-merged" records for reference			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to separate patient records that were incorrectly merged			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Vaccination Event Matching & Deduplication	ability to prevent potential duplicate vaccination events at the immunization level			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to automatically identify incoming vaccination event as potential duplicates			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
		Vaccination Event Matching & Deduplication	ability to automatically select the most accurate vaccination event based on deduplication rules			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to automatically identify existing vaccination events as potential duplicates			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to manually flag potential duplicate vaccination events for manual review			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to display potential duplicate vaccine records for an individual patient			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
		Vaccination Event Matching & Deduplication	ability to manually merge a duplicate vaccination event			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
		Vaccination Event Matching & Deduplication	ability to manually delete a duplicate vaccination event			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
		Vaccination Event Matching & Deduplication	ability to automatically consolidate two or more duplicate vaccination events			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, surnames, and configurable thresholds. Cost: Included, Timeline: Month 5-6
Added		Vaccination Event Matching & Deduplication	ability to retain "pre-merged" or "pre-consolidated" vaccination events for reference			E	Yes with configuration	Data validation will be configured against CDC code tables and business rules with real-time flagging. Cost: Included, Timeline: Month 4-5
Added		Vaccination Event Matching & Deduplication	ability to separate vaccination events that were incorrectly merged or consolidated			E	Yes with configuration	Data validation will be configured against CDC code tables and business rules with real-time flagging. Cost: Included, Timeline: Month 4-5

Status	Req. #	Capability	Requirement: The IS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No	Vendor comments
Updated		Clinical Decision Support	ability to provide immunization clinical decision support according to ACIP recommendations		E	Yes with configuration	Forecasting capabilities will be configured with basic rates (Month 3-6) than full CDCS integration (Month 7-8). Cost: Included. Timeline: Month 5-8	
		Clinical Decision Support	ability to support a vaccine clinical decision support algorithm aligned with the CDC CDCS logic		E	Yes with configuration	CDC CDCS integration will be configured for ACIP-compliant forecasting via RESTful web service. Cost: Included. Timeline: Month 7-8	
		Clinical Decision Support	ability for jurisdictional admin to update the CDCS rules		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Child and Adolescent		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Recommended Catch-up		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Adult Immunization Schedule		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Child and Adolescent Immunization Schedule		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Recommended Catch-up Immunization		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to display and highlight vaccines that are overdue		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Clinical Decision Support	ability to display and highlight vaccines that are overdue		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Clinical Decision Support	ability to display an indication when a vaccine series is complete		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Clinical Decision Support	ability to display vaccine-specific contraindications according to CDC lists of vaccine contraindications		O	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Clinical Decision Support	ability to take into account contraindications and preconditions in the vaccine forecast		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to take into account evidence of immunity in the vaccine forecast		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to generate a forecast of specific vaccines required for individuals who travel outside the US		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to maintain historical records of effective dates of previous forecast schedules		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Clinical Decision Support	ability to review an immunization schedule that was appropriate at the time of administration		O	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Clinical Decision Support	ability to apply an immunization schedule that was appropriate at the time of administration		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to account for immune globulin in vaccine forecasting		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to create test cases for reuse during user acceptance testing		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to save test cases for reuse during user acceptance testing		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Clinical Decision Support	ability to compare the expected results of the forecasting test case to the actual results observed by the		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to generate patient-specific reminder/recall notifications		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Reminder/Recall	ability to select one or more vaccines for generating reminder/recall notifications		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to view the date the reminder/recall notice was sent to a patient		O	Yes	BlueDot provides this capability through its comprehensive platform features.	
Updated		Reminder/Recall	ability to generate lists of patients in need of a reminder/recall notification by organization		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Reminder/Recall	ability to generate patient-specific reminder/recall notices per consent designation		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to generate patient-specific reminder/recall notices by user-defined parameters		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to generate reminder/recall in user-defined format		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Reminder/Recall	ability to select the age of the cohort when generating reminder/recall notifications	Particularly relevant	E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to print patient-specific reminder/recall notices by user-defined parameters		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Reminder/Recall	ability to generate patient-specific reminder/recalls in a user-defined format		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability for an end user to generate patient-specific reminder/recalls in accordance with HIPAA and		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability for an end user to print patient-specific reminder/recalls in accordance with HIPAA and		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
Updated		Reminder/Recall	ability to generate vaccine recall notices by facility based on vaccine name, vaccination date range, and lot		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Reminder/Recall	ability to generate vaccine recall notices by administering provider based on vaccine name, vaccination		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Reminder/Recall	ability to set the limit/number of times a patient will receive a reminder/recall		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Reminder/Recall	ability to modify the limit/number of times a patient will receive a reminder/recall		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
Updated		Reminder/Recall	ability to exclude a patient who has met the limit/number of times to receive a reminder/recall		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to generate a list of phone numbers for patients needing reminder/recall		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to manually review a patient list for a reminder/recall notification		E	Yes	BlueDot provides this capability through its comprehensive platform features.	
		Reminder/Recall	ability to flag patients to exclude before sending a reminder/recall notification		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to establish a time interval between reminder/recall notices (e.g., 90 days or 60 days)		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to generate a reminder/recall notifications for patients with an active status for their organization		E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to generate reports that include reminder/recall history for specific date range		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to make all reminder/recall data accessible to authorized users for a predetermined period of time		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Reminder/Recall	ability to aggregate multiple notices going to the same address into one notification		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Coverage Reports	ability to generate reports displaying information on immunization coverage rates among subject		O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6	
		Coverage Reports	ability to generate reports for organizations and facilities per CDC Immunization Quality Improvement		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports on immunization coverage for a user-defined geographic area		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports on immunization coverage for a patient cohort		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports displaying immunization coverage report		O	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports displaying immunization coverage trends over time, over a selected time frame		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports that display the number of missed opportunities for vaccination		E	Yes	BlueDot provides comprehensive reporting and data access capabilities.	
Updated		Coverage Reports	ability to generate reports displaying the number of patients late up-to-date for immunization who are		E	Yes	BlueDot provides comprehensive reporting and data access capabilities.	
		Coverage Reports	ability to generate reports that display the number of invalid vaccine doses		E	Yes	BlueDot provides comprehensive reporting and data access capabilities.	
		Coverage Reports	ability to generate reports displaying vaccine exemption rates		E	Yes	BlueDot provides comprehensive reporting and data access capabilities.	
		Coverage Reports	ability to generate reports displaying immunization coverage by user-defined parameters		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports displaying immunization coverage by vaccine type		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports displaying immunization coverage by age range		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports displaying immunization coverage by ethnicity		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
		Coverage Reports	ability to generate reports displaying immunization coverage by race		E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	
Updated		Coverage Reports	ability to generate reports displaying immunization coverage by patient sex		O	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographic. Cost: Included. Timeline: Month 6-8	

Status	Req. #	Capability	Requirement: The IS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization, No (comment required)	Vendor comment(s)
		Patient Search	ability to search for patient records			E	Yes	BlueDot provides patient search with multi-criteria options including name matching (exact/sounded), DOB, identifiers, and demographics.
		Patient Search	ability to search patient record based on one or multiple user defined parameters			E	Yes	BlueDot provides patient search with multi-criteria options including name matching (exact/sounded), DOB, identifiers, and demographics.
		Patient Search	ability to re-search for a patient record by modifying existing search parameters			E	Yes	BlueDot provides patient search with multi-criteria options including name matching (exact/sounded), DOB, identifiers, and demographics.
		Patient Search	ability to display the list of returned possible patient matches per jurisdictional policy			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Search	ability to select a patient record from the list of possible patient matches			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to add demographic information to a patient record			E	Yes	BlueDot manages comprehensive demographics including name, DOB, gender, race, ethnicity, address, and identifiers.
		Add, Edit Patient	ability to create a new patient record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to edit demographic information in a patient record			E	Yes	BlueDot manages comprehensive demographics including name, DOB, gender, race, ethnicity, address, and identifiers.
		Add, Edit Patient	ability to insert permanent comments in a patient's record that can be viewed based on			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to display the user who created the permanent comment in a patient's record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to prevent a patient record from being saved unless required fields are completed, per			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to automatically notify a user when attempting to submit an incomplete patient record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store CDC-endorsed core data elements for all patient records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store multiple reported names for each patient to include: first name, middle name,			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store multiple patient addresses			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to support multiple patient address type designations (e.g., primary address, vacation			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to identify effective dates for use of a patient address			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store all historic addresses for a patient			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store country information related to where the patient was born			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, edit patient	ability to flag patient address as a verified United States Postal Service address (e.g., via			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, edit patient	ability to record date patient address last verified as a United States Postal Service address (e.g., via			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to automatically create a unique patient ID number			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to automatically associate patient ID number to the patient's record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to track patients of all ages per jurisdictional law or policy			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store mother's HBA status for a patient			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store a patient's occupation	Particularly relevant		E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to designate patient as belonging to a priority group for vaccination	Particularly relevant		O	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to store multiple patient identifiers	Particularly relevant		E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to assign patient records to a cohort	Particularly relevant		E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to assign patient records to multiple cohorts	Particularly relevant		E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to view patient records by cohort	Particularly relevant		E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to remove patient records from a cohort	Particularly relevant		E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to manage patient status at the organization/facility level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to store active patient status at the organization/facility level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to store inactive patient status at the organization/facility level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to edit active patient status at the organization/facility level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to edit inactive patient status at the organization/facility level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to store reason for inactive status of patients at the organization/facility level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to edit multiple patients status in one action			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to manage patient status at the geographic jurisdictional level			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to store active patient status at the geographic jurisdictional level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to store inactive patient status at the geographic jurisdictional level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to edit active patient status at the geographic jurisdictional level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to edit inactive patient status at the geographic jurisdictional level			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to store reason for inactive status of patients at the geographic jurisdictional level			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to restrict access to patient records that have been placed in an inactive status			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Status	ability to restrict edits to patient records that have been placed in an inactive status			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Consent	ability to manage patient consent per jurisdictional policy			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Consent	ability to update patient consent on a patient's record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Consent	ability to opt out a patient from participation in the IIS			E	Yes	BlueDot provides comprehensive patient management capabilities.
Added		Patient Consent	ability to opt in a patient for participation in the IIS			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Consent	ability to enable access to a patient record per consent designation			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Consent	ability to enable updates to a patient record per consent designation			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to add vaccination event information to a patient record			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to edit vaccine information in a patient record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to mark vaccine information in a patient record for deletion			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to add reason for deletion of vaccine information in a patient record			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to capture vaccine eligibility by vaccine dose for publicly purchased vaccine			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store vaccine eligibility by vaccine dose for publicly purchased vaccine			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to report multiple doses administered to the same patient on the same administration date			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store all CDC-endorsed core data elements related to vaccine events			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to enter vaccination standard or otherwise compromised flag			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to view submitted vaccination event information on a patient's record			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to store adverse reactions in accordance with Vaccine Recommendations and Guidelines of			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to flag an adverse reaction as having been reported to VAERS			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store patient vaccination event funding eligibility information			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to print form for signature of vaccine refusal by patient for each individual vaccine antigen			O	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to ensure that the default lot number is from the oldest lot when entering an administered			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to record administration of vaccination regardless if vaccine has since expired in inventory			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to track vaccinations that require adjuvant	Particularly relevant		E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Print/Export Record	ability to securely print a patient immunization record			E	Yes	BlueDot provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to include evaluated history in the printable version of the patient record			E	Yes	BlueDot provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to include the forecast in the printable version of the patient record			E	Yes	BlueDot provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to include immunity in the printable version of the patient record			E	Yes	BlueDot provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to securely export a patient immunization record			E	Yes	BlueDot provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to export a patient record in user-defined format			O	Yes	BlueDot supports export in Excel, CSV, PDF, XML, and JSON formats.
		Mass Vaccination	ability to support mass vaccination operations	Necessary for mass		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability to rapidly capture patient demographic information offline during mass vaccination clinic	Necessary for mass		E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Mass Vaccination	ability to rapidly capture vaccine information offline during mass vaccination clinic for later	Necessary for mass		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability to support rapid capture of patient demographic information during mass vaccination	Necessary for mass		E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Mass Vaccination	ability to support rapid capture of vaccine information during mass vaccination clinic	Necessary for mass		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability to administer vaccines during public health emergency without impacting the patient's	Necessary for mass		O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability for jurisdictional admin to flag/indicate org/facility participation in mass vaccination event	Necessary for mass		O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6

Status	Req. #	Capability	Requirement: The IIS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with configuration, No, No comment required
		Vaccine Inventory	ability to search inventory by user-defined parameters			E	Yes with configuration
		Vaccine Inventory	ability to search the inventory by funding source			E	Yes with configuration
		Vaccine Inventory	ability to search inventory by vaccine type			E	Yes with configuration
		Vaccine Inventory	ability to search inventory by vaccine lot number			E	Yes with configuration
		Vaccine Inventory	ability to search inventory by vaccine NDC code			E	Yes with configuration
		Add, Edit Vaccine	ability to manage vaccine inventory			E	Yes with configuration
		Add, Edit Vaccine Inventory	ability to support visualization of current vaccine inventory			E	Yes with configuration
		Add, Edit Vaccine	ability to edit inventory funding source at the lot level			E	Yes with configuration
		Add, Edit Vaccine	ability to edit inventory funding source at the vaccine level			E	Yes with configuration
		Add, Edit Vaccine	ability to add vaccine information to inventory			E	Yes with configuration
		Add, Edit Vaccine	ability to support barcode scanning system to electronically upload vaccine inventory to the IIS			E	Yes with configuration
		Add, Edit Vaccine	ability to view current inventory list by facility	Particularly		O	Yes with configuration
		Add, Edit Vaccine	ability to view current inventory list by organization			E	Yes with configuration
		Add, Edit Vaccine	ability for jurisdictional admin to edit organization/facility inventory			E	Yes with configuration
		Add, Edit Vaccine	ability to manage vaccine borrowed from lots belonging to one funding source to lots belonging to another funding source			O	Yes with configuration
		Add, Edit Vaccine	ability to reclassify funding source of borrowed vaccine from private to public or vice versa for replacement cases			O	Yes with configuration
		Add, Edit Vaccine	ability to view storage capability			O	Yes with configuration
		Add, Edit Vaccine	ability to document vaccine storage and handling events such as temperature excursions	Particularly		E	Yes with configuration
		Add, Edit Vaccine	ability to store storage capability	Particularly		E	Yes with configuration
		Vaccine Ordering	ability for rule based logic to recommend vaccine order quantity			E	Yes with configuration
		Vaccine Ordering	ability to alert user when "reorder recommendation" inventory level is reached			O	Yes with configuration
Updated		Vaccine Ordering	ability to pre-populate order with recommended quantities based on inventory, doses reported as administered to IIS			E	Yes with configuration
		Vaccine Ordering	ability to edit pre-populated order quantity			E	Yes with configuration
		Vaccine Ordering	ability to order vaccines			E	Yes with configuration
		Vaccine Ordering	ability for jurisdictional admin to activate vaccines available for ordering			E	Yes with configuration
		Vaccine Ordering	ability for jurisdictional admin to deactivate vaccines available for ordering			E	Yes with configuration
		Vaccine Ordering	ability to order publicly-purchased vaccines			E	Yes with configuration
		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 with configuration
		Vaccine Ordering	ability to enter a reason for vaccine orders outside the recommended order quantity			E	Yes with configuration
		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 with configuration
		Vaccine Ordering	ability to update contact information during each order without leaving ordering workflow			E	Yes with configuration
		Vaccine Ordering	ability to save an unsubmitted order			E	Yes with configuration
		Vaccine Ordering	ability to update organization/facility contact information before submitting a vaccine order			E	Yes with configuration
		Vaccine Ordering	ability to cancel unsubmitted or unprocessed vaccine orders			E	Yes with configuration
		Vaccine Ordering	ability to edit unsubmitted or unprocessed vaccine orders			E	Yes with configuration
		Vaccine Ordering	ability to save an unsubmitted order after rejection			E	Yes with configuration
		Vaccine Ordering	ability to verify order information before order submitted			E	Yes with configuration
		Vaccine Ordering	ability for jurisdictional admin to reject a vaccine order			E	Yes with configuration
		Vaccine Ordering	ability for jurisdictional admin to select a reason code when rejecting an order			E	Yes with configuration
		Vaccine Ordering	ability to edit an order after rejection			E	Yes with configuration
		Vaccine Ordering	ability to resubmit an order after rejection			E	Yes with configuration
		Vaccine Ordering	ability to electronically notify the facility of a rejected order			E	Yes with configuration
		Vaccine Ordering	ability to track the shipping status of orders			E	Yes with configuration
		Vaccine Ordering	ability to verify packing slip information after order is shipped			O	Yes with configuration
		Vaccine Ordering	ability to receive electronic notification when order quantity received does not match vaccine order			O	Yes with configuration
		Vaccine Ordering	ability to receive electronic notification when vaccine order received is damaged			O	Yes with configuration
		Vaccine Ordering	ability to request shipping labels for non-dose vaccine subject to return			O	Yes with configuration
		Vaccine Ordering	ability to search for past vaccine returns within a specified timeframe			O	Yes with configuration
		Vaccine Ordering	ability to view past vaccine returns within a specified timeframe			E	Yes
		Vaccine Ordering	ability to pre-book vaccine orders	Particularly		E	Yes with configuration
		Vaccine Ordering	ability for jurisdictional admin to allocate vaccine inventory per user defined parameters	Particularly		E	Yes with configuration
		Vaccine Ordering	ability to activate vaccine ordering functionality for all designated organizations/facilities during a public health emergency	Particularly		E	Yes with configuration
		Vaccine Ordering	ability for jurisdictional admin to create order sets	Particularly		E	Yes with configuration
		Review/Approve Order	ability for jurisdictional admin to review order			E	Yes with configuration
		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 with configuration
		Review/Approve Order	ability for jurisdictional admin to approve order			E	Yes with configuration
		Review/Approve Order	ability for jurisdictional admin to adjust order			E	Yes with configuration
		Review/Approve Order	ability for jurisdictional admin to electronically accept VFC vaccine into inventory			E	Yes with configuration
		Review/Approve Order	ability to accept each vaccine product in the IIS after shipment is received			E	Yes with configuration
		Vaccine Dose	ability to automatically decrement vaccine doses from inventory when matched vaccine doses are reported as administered			E	Yes with configuration
		Vaccine Dose	ability to automatically match vaccine doses reported as administered to vaccine doses in inventory to facilitate dose decrementing			E	Yes with configuration
		Vaccine Dose	ability to automatically decrement vaccine inventory in real-time via HL7 messaging			E	Yes with configuration
		Vaccine Dose	ability to automatically decrement vaccine inventory in real-time via UI data entry			E	Yes with configuration
		Vaccine Inventory	ability to reconcile vaccine doses currently in physical storage with vaccine doses reflected in system inventory			E	Yes with configuration
		Vaccine Inventory	ability to document reductions in vaccine inventory due to outgoing vaccine transfers			E	Yes with configuration
		Vaccine Inventory	ability to electronically document reductions in vaccine inventory due to outgoing vaccine wastage			E	Yes with configuration
		Vaccine Inventory	ability to enter current number of vaccine doses on hand in physical storage			E	Yes with configuration
		Vaccine Inventory	ability to track and manage doses for vaccines on hand, administered, wasted, expired, ordered, recalled, returned, transferred			E	Yes with configuration
		Vaccine Inventory	ability to enable removal of recalled lots from active inventory			E	Yes with configuration
		Vaccine Inventory	ability to print a reconciliation worksheet			E	Yes with configuration
		Vaccine Transfers	ability for jurisdictional admin to approve vaccine transfers			O	Yes with configuration
		Vaccine Transfers	ability for jurisdictional admin to initiate VFC vaccine transfers			O	Yes with configuration
		Vaccine Transfers	ability to accept VFC vaccine transfers			O	Yes with configuration
		Vaccine Transfers	ability for jurisdictional admin to reject vaccine transfers			O	Yes with configuration
		Vaccine Transfers	ability to search and view past vaccine transfers within a specified timeframe			O	Yes with configuration
		Vaccine Transfers	ability for jurisdictional admin to allow for direct vaccine transfer between facilities without jurisdictional pre-approval, but with jurisdictional visibility/oversight	Particularly		O	Yes
		Vaccine Wastage	ability to manage vaccine wastage			O	Yes with configuration
		Vaccine Wastage	ability to determine the total cost of wasted vaccine by user-defined parameters			E	Yes with configuration
		Vaccine Wastage	ability for jurisdictional admin to modify inventory quantity to reflect wastage			E	Yes with configuration
		Vaccine Wastage	ability for jurisdictional admin to assign reason for inventory wastage			E	Yes with configuration
		Vaccine Wastage	ability to determine the total doses of vaccine wasted by user-defined parameters			E	Yes with configuration
		Vaccine Expiration	ability to manage vaccine expiration			E	Yes with configuration
		Vaccine Expiration	ability to alert users to vaccine nearing expiration			O	Yes with configuration
		Vaccine Expiration	ability to provide alerts for inventory already expired			O	Yes with configuration
		Vaccine Expiration	ability for jurisdictional admin to modify inventory quantity removed from available inventory			E	Yes with configuration



Status	Req. #	Capability	Requirement: The IIS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, No with customization*. No *Comment required
Updated		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 with configuration
		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 with configuration
		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 with configuration
		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 with configuration
		Standard Reports	ability to generate a report that provides/displays information about current inventory			E	Yes with configuration
		Standard Reports	ability to generate a report that provides/displays information about inventory			E	Yes with configuration
		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 VFCs within a selected timeframe			E	Yes with configuration
		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 immunization utilization			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 status	Needed		E	Yes
		Standard Reports	ability to generate report of student exemptions by type (medical, religious)	Needed		E	Yes
		Standard Reports	ability to generate a record of students' immunizations for school purposes	Needed		E	Yes
		Standard Reports	ability to generate exclusion letters stating which vaccine(s) a student needs to come into school	Needed		E	Yes
		Standard Reports	ability to generate reports for individuals vaccinated during a mass vaccination event	Needed		E	Yes
		Standard Reports	ability to generate doses administered reports for priority groups during a public health emergency	Needed		E	Yes
		Standard Reports	ability to generate a report that provides information about the status of the system in real-time			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)			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	Particu		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
		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	Particu		E	Yes
		Print/Export Reports	ability to export record level de-identified data	Particu		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 with configuration
		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 a physical card	Particu		E	Yes with configuration
Updated		Consumer Access	ability for authorized consumer to view immunization forecast			E	Yes
Updated		Consumer Access	ability for authorized consumer to view patient information			E	Yes
Updated		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 with configuration
		Consumer Access	ability for patient/patient representative to opt out of reminder/recall notifications			O	Yes with configuration



Non-Functional

Items in red indicate where a jurisdiction should include a measure/threshold that meets their needs.

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Status	Req. #	Attribute	Sub-Characteristic	Requirement: The IS must/should	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required	Vendor comment(s)
		Performance	Time Behavior	support a responsive user interface			E		
		Performance	Time Behavior	support application launch, i.e. time between user initiation and application start, in less than 10 seconds	See recommendations: 10 seconds		E		
		Performance	Time Behavior	support response to a user navigation action (e.g., mouse movement, keypresses, navigation) in less than 1 second	See recommendations: 1 second		E		
		Performance	Time Behavior	support response to process submitted information via direct data entry in less than 4 seconds	See recommendations: 4 seconds		E		
		Performance	Time Behavior	support generation of a standard, pre-configured report in less than 30 seconds	See recommendations: 30 seconds		E		
		Performance	Time Behavior	support response to a submitted HL7 message			E		
		Performance	Time Behavior	support electronic response to a submitted HL7 message in 5 seconds or less, 95% of the time	See recommendations: 5 seconds or less, 95% of the time		E		
		Performance	Capacity	support up to 1000 concurrent users of the user interface without performance degradation			E		
		Performance	Capacity	support multiple users viewing the same data at the same time			E		
		Performance	Capacity	support users using the same function at the same time without degrading IS performance			E		
		Performance	Resource	support resource-intensive tasks without degrading IS performance			E		
		Performance	Resource	support user queries via the user interface without degrading IS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Resource	support generation of ad hoc reports without degrading IS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Resource	support data extracts without degrading IS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Capacity	support efficient processing of HL7 messages without performance degradation, as per jurisdictional capacity			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Capacity	support processing of up to 200 of HL7 V2U messages per hour without performance degradation			E		
		Performance	Capacity	support processing of up to 6000 of HL7 C8P messages per hour without performance degradation			E		
		Performance	Capacity	support permanent storage of records per jurisdictional policy			E		
		Performance	Capacity	support storage of unlimited number of organization records			E		
		Performance	Capacity	support storage of unlimited number of user records			E		
		Performance	Capacity	support storage of unlimited number of patient records			E		
		Performance	Capacity	support storage of unlimited number of patient immunization records			E		
		Usability	Necessity	meet the User Story Acceptance Criteria for the 2019 HIT Standards			E		
		Usability	Operability	support hot shortcuts for web applications (e.g., window, search) as recommended by the			E		
		Usability	Operability	ability to execute Boolean searches			E		
		Usability	Operability	ability to execute wildcard searches			E		
		Usability	User error	minimize data entry errors			E	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	enter data correctly via pick-lists, drop-down boxes, or other easy-to-use options such as			E	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	indicate required fields for data entry			E	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	ability to provide alert when required fields are left blank			E	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	support cross-field checks to ensure accuracy of information where dependencies exist (e.g., warning that a			E	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	support spell check functionality with medical terminology for all free text fields			O	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
Updated		Usability	User error	support differentiation between warning messages (error is recommended prior to entry being continued)			O	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User interface	support interaction to use the user interface			O	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Usability	User interface	support user feedback with a simple indicator for response times between 2-4 seconds	See recommendations: 2-4 seconds		O		
		Usability	User interface	support user feedback with expected response time and percent-done indicator for response times greater	See recommendations: 4 seconds		O		
		Usability	User interface	support users in stopping an operation expected to take longer than 10 seconds	See recommendations: 10 seconds		O		
		Usability	User interface	support users in performing other tasks while waiting for the system to complete tasks expected to take longer	See recommendations: 20 seconds		O		
		Usability	Flexibility	support availability of information as needed			E		
		Reliability	Availability	support access to the web application 99.9% of the time	See recommendation 99.9%		E		
		Reliability	Availability	support processing of and response to HL7 messages 99.9% of the time	See recommendation 99.9%		E		
		Reliability	Recoverability	ability to backup the IS data as per jurisdictional policy			E		
		Reliability	Recoverability	support redundancy of the IS as per jurisdictional recovery plan			E		
		Reliability	Recoverability	support real-time failover			E		
		Reliability	Recoverability	support the recovery of backed up data as needed			E		
		Reliability	Recoverability	support the restoration of IS data after an outage or loss			E		
		Reliability	Fault tolerance	support the efficient roll back of software changes as needed			E		
		Security	Non-repudiation	support audit logs for security purposes			E	Yes with configuration	This capability will be configured during implementation to meet its requirements. Cost: Included. Timeline: Month 4-6
		Security	Integrity	ability to electronically notify the system administrator of unauthorized activity			E		
		Security	Authenticity	ability to track all attempted access that fail identification, authentication and authorization requirements			E		
		Security	Authenticity	ability to track all accesses that successfully comply with identification, authentication and authorization			E		
		Security	Non-repudiation	ability to maintain audit logs for specified time per jurisdictional policy			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by function performed			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by date and time period			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by date range			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by user defined parameters			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by patient identifiers			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to filter audit log search by user defined parameters			O	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to sort audit log search results			O	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	store audit data related to user access/viewing of patient records in the system			E		
		Security	Integrity	store date of user access to a patient record			E		
		Security	Integrity	store time of user access to a patient record			E		
		Security	Integrity	store user ID of user access to a patient record			E		
		Security	Non-repudiation	store audit data related to data changes in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'date received' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'time received' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'date updated' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'time updated' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store user associated with data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	automatically enforce session timeout for user when idle period is reached			E		
		Security	Integrity	ability for automatic session timeout to be customized per jurisdictional policy			O		
		Security	Integrity	ability to notify the user the session will expire			O		
		Security	Confidentiality	support masking of passwords as they are typed or entered into the User Interface			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability for system administrator to terminate user connections			E		
		Security	Confidentiality	safeguard electronic personally identifiable information by implementing the appropriate technical best	NIST Special Publications, Federal Information		E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to encrypt personally identifiable information at rest			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to decrypt personally identifiable information at rest			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to encrypt personally identifiable information during transmission			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to decrypt personally identifiable information during transmission			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability to maintain firewalls per NIA's Security Guidance Considerations for Immunization Information			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability to maintain firewalls for protection of the hosting network			E		
		Security	Integrity	ability to maintain firewalls for protection of the hosting environment			E		
		Security	Integrity	ability to electronically notify the system administrator of unauthorized activity			E		
		Security	Integrity	ability to support web virus protection at current critical patch levels in the hosting environment			E		
		Maintainability	Availability	support event logging			E		
		Maintainability	Availability	ability for system admin to enable event logging on all servers			O		
		Maintainability	Availability	ability for system admin to enable event logging on all devices			O		
		Maintainability	Availability	ability for system admin to disable event logging on all devices			O		
		Maintainability	Availability	ability for system admin to limit access to event log, including System, Application, Web and Database logs			O		
		Portability	Adaptability	support use of web browsers per jurisdictional policy			E		
		Portability	Adaptability	support use of current version of web browsers			E		
		Portability	Adaptability	support use of last prior version of web browsers			E		
		Portability	Adaptability	support a responsive design that renders properly on multiple devices			E		



Draft IIS Functional Standards, v5.0			IIS Functional Model Functions				
Goal	Standard	Guidance Statement	Administer System	Manage Organizations and Facilities	Manage Users	Support Interoperability	Ensure Data Quality
A. Establish and maintain a secure, confidential Immunization Information System.	1.0 The IIS is physically and digitally secured in accordance with policies and industry standards for protected health information, security, and encryption.	1.1 The IIS establishes, documents, and updates policies and procedures to manage the collective functions, capabilities, and attributes of an IIS.			x		
		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.					
		1.3 The IIS provides ongoing training to ensure awareness of and to promote adherence to policies and procedures.			x		
	2.0 The IIS is physically and digitally secured in accordance with industry standards for disaster avoidance, mitigation, and recovery.	2.1 The IIS establishes and maintains the infrastructure needed for disaster avoidance.					
		2.2 The IIS establishes and tests recovery plans to mitigate system downtime.					

	3.0 The IIS defines service expectations between the program and the entities providing information technology support to ensure system availability and uninterrupted data flow.				
	3.1 The IIS implements service-level agreements between the program and the entities providing information technology and support.				
	3.2 The IIS implements and maintains the infrastructure to fulfill service-level agreements.				
	4.0 The IIS validates patient demographic and vaccination data.	X		X	X
	4.1 The IIS supports the identification, prevention, and resolution of duplicate and fragmented patient demographic and vaccination data in accordance with policies and procedures.				X
B. Continuously improve IIS data quality.	4.2 The IIS monitors data quality within the IIS in accordance with policies and procedures.	X		X	X
	4.3 The IIS uses electronic tools to standardize and/or validate addresses in the IIS.	X			
	4.4 The IIS delivers feedback and training to IIS partners and providers to ensure complete, timely, and accurate patient demographic and vaccination records.				
	4.5 The IIS meets federal and				X
C. Promote electronic data exchange between the IIS and its partners and providers.	5.0 Manage interfaces for exchange and integration of data electronically between the IIS and other information systems in accordance with federal and jurisdictional standards.			X	X
	5.1 The IIS exchanges data in			X	
	5.2 The IIS actively recruits,			X	
	5.3 The IIS actively monitors			X	X

	5.4 The IIS investigates and					X	
D. Ensure the delivery of immunization services reflects current ACIP recommendations.	6.0 The IIS supports pediatric, adolescent, and adult immunization forecasts consistent with Advisory Committee on Immunization Practices (ACIP) recommendations.						
	6.1 The IIS establishes and						
	6.2 The IIS establishes and						
E. Ensure appropriate user access to data.	7.0 The IIS ensures authorized users have access to patient demographic and vaccination data based on user roles and permissions.	X	X	X			
	7.1 The IIS implements						
	7.2 The IIS implements						
	7.3 The IIS supports technical	X	X	X			
	7.4 The IIS provides user access			X			
	7.5 The IIS supports authorized	X	X	X			
	7.6 The IIS provides training						
	7.7 The IIS identifies and	X	X	X			
	8.0 The IIS supports authorized public access to official immunization records.						
	8.1 The IIS provides consumers						
F. Support the generation and use of IIS data through various channels and formats.	9.0 The IIS supports the reporting needs of federal and jurisdictional immunization programs.						
	9.1 The IIS provides standard						
	10.0 The IIS supports ad-hoc queries of patient demographic and vaccination data.						
	10.1 The IIS supports direct						
	10.2 The IIS supports access to						
	11.0 The IIS supports investigation and reporting of vaccine adverse events.						
	11.1 The IIS supports vaccine						
	11.2 The IIS refers users to						
	12.0 The IIS supports the ability to generate coverage reports that users can access without assistance from IIS staff.						
	12.1 The IIS provides access to						
	12.2 The IIS manages patient						
	12.3 The IIS provides IIS-related						
	12.4 The IIS supports						
	13.0 The IIS supports reminder/recall activities.						
	13.1 The IIS supports						

G. Support federal and jurisdictional vaccine program requirements.	14.0 The IIS supports management and quality assurance functions for federal and jurisdictional vaccine programs.					
	14.1 The IIS establishes vaccine					
	14.2 The IIS supports the					
	14.3 The IIS generates a report					
	14.4 The IIS generates a report					
	15.0 The IIS supports vaccine inventory management and reconciliation according to federal and jurisdictional vaccine program requirements.					
	15.1 The IIS supports vaccine					
	15.2 The IIS supports creating					
	15.3 The IIS supports reporting					
	15.4 The IIS automatically					
	16.0 The IIS supports data exchange with the national Vaccine Tracking System (VTrckS).					X
	16.1 The IIS establishes data					X
	16.2 The IIS completes updates					X
	16.3 The IIS establishes					X
H. Support response efforts for vaccine-preventable disease outbreaks and other public health emergencies.	17.0 The IIS supports partner and provider onboarding and vaccine management during vaccine-preventable disease response and/or public health emergencies.	X	X	X	X	
	17.1 The IIS establishes, communication and onboarding with partners to capture patient demographic and vaccination data in an emergency.	X	X	X		
	17.3 The IIS provides training		X			
	17.4 The IIS supports vaccine					
	17.5 The IIS supports					X
	17.6 The IIS supports public					
I. Participate in and prioritize emerging technologies and standards.	18.0 The IIS participates in modernization initiatives and emerging technologies.					
	18.1 The IIS coordinates					
	18.2 The IIS plans and executes					
	18.3 The IIS participates in					

**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.

Benchlab LLC

(Company)

Anthony Forte - Director of Operations / Patrick Barber - President

(Representative Name, Title)

301-276-7978

(Contact Phone/Fax Number)

03.24.26

(Date)

State of West Virginia

Vendor Name:

By: \_\_\_\_\_

By: Patrick Barber

Printed Name: \_\_\_\_\_

Printed Name: Patrick Barber

Title: \_\_\_\_\_

Title: President

Date: \_\_\_\_\_

Date: 03.24.26

**AGREED:**

Name of Agency: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Name of Vendor: Benchlab LLC

Signature: 

Title: Director of Operations

Date: 03.24.24

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

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

Benchlab LLC  
Company

[Signature]  
Authorized Signature

03-24-26  
Date

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

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

(Printed Name and Title) Patrick Barber President  
(Address) 13 Caroline Dr. Middleboro MA  
(Phone Number) / (Fax Number) 301-276-7978  
(email address) pbarber@benchlabsolutions.com

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

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

Benchlab LLC  
(Company)  
[Signature]  
(Signature of Authorized Representative)  
Anthony Forte - Director of Operations  
(Printed Name and Title of Authorized Representative) (Date)  
301-276-7978  
(Phone Number) (Fax Number)  
aforte@benchlabsolutions.com  
(Email Address)

### Appendix A

(To be completed by the Agency's Procurement Officer prior to the execution of the Addendum, and shall be made a part of the Addendum. Required information not identified prior to execution of the Addendum may only be added by amending Appendix A and the Addendum, via Change Order.)

Name of Service Provider/Vendor: BenchLab Solutions (BenchLab LLC)

Name of Agency: WV Department of Health Office of Epidemiology

Agency/public jurisdiction's required information:

1. Will restricted information be processed by the service provider?  
Yes   
No
2. If yes to #1, does the restricted information include personal data?  
Yes   
No
3. If yes to #1, does the restricted information include non-public data?  
Yes   
No
4. If yes to #1, may the service provider store public jurisdiction data in a data center in an acceptable alternative data center location, which is a country that is not the U.S.?  
Yes   
No

5. Provide name and email address for the Department privacy officer:

Name: Chris Snyder

Email address: chris.s.snyder@wv.gov

Vendor/Service Provider's required information:

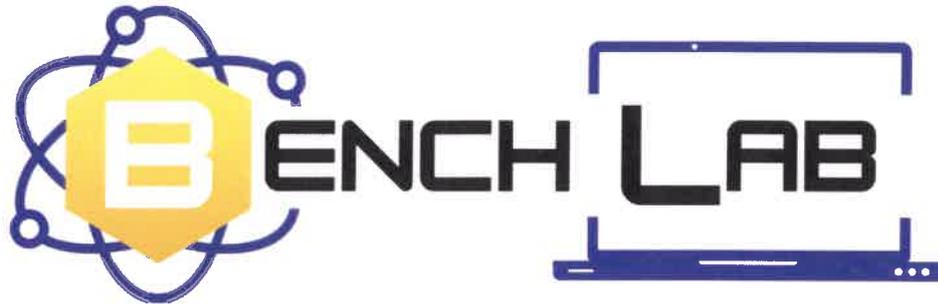
6. Provide name and contact information for vendor's employee who shall serve as the public jurisdiction's primary security contact:

Name: Anthony Forte Director of Operations - Benchlab LLC

Email address: aforte@benchlabsolutions.com

Phone Number: 301-276-7978 (Patrick Barber - President)

## Letter of Transmittal



**Solicitation Name:** Immunization Information System  
**Solicitation Number:** CRFP MIS2600000001  
**Due Date:** 03/24/2026  
**Contracting Officer:** Crystal Hustead  
**Contracting Officer Email:** [crystal.g.hustead@wv.gov](mailto:crystal.g.hustead@wv.gov)  
**Contracting Officer Phone:** (304) 558-2402

**Company Name:** BenchLab Solutions  
**UEI: / CAGE Code:** RS8HS92TH455 / 9WFD2  
**DUNS:** 062769713  
**SAM Registered Contact Name:** BenchLab, LLC, Patrick Barber, President  
**Address:** 13 Caroline Drive, Middletown, MD 21769  
**Phone Number:** (301) 276-7978  
**Email Address:** [pbarber@benchlabsolutions.com](mailto:pbarber@benchlabsolutions.com)  
**Approximate Annual Gross Revenue:** \$2,000,000  
**Small Business Status:** SBE  
**Expected NAICS Codes:** 54151, 541511, 541512

*This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed - in whole or in part - for any purpose other than to evaluate this proposal. If, however, a contract is awarded to **BenchLab, LLC** as a result of - or in connection with -- the submission of this data, the Government shall have the right to duplicate use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained on all sheets in this volume.*

Transmittal Letter  
March 24, 2026

Ms. Crystal G. Husted  
Dept. of Administration, Purchasing Division  
2019 Washington Street  
East Charleston, WV 25305

Re: Solicitation CRFP MIS2600000001 - Immunization Information System

Dear Ms. Husted,

On behalf of BenchLab Solutions, I am pleased to submit our proposal in response to Solicitation Number CRFP MIS2600000001 - Immunization Information System.

BenchLab Solutions is a scientific solutions-based company centered upon providing solutions for science and health based spaces with focus on addressing the challenges encountered in these domains. Our staff have, on average, 15 years of experience providing data management information systems expertise and services to agencies and private sector clients.

Our core competencies include:

- Cradle to grave delivery to clients
- Extensive experience and understanding of domain-specific workflows
- Managed Services including Project Management, Business Analysis, Quality Assurance

For this technical proposal, we provide information including:

- Technical narrative
- Proposed Solution
- Project Approach

We are confident that our expertise and approach make us an ideal future partner for this endeavor. Our response demonstrates how we will meet and exceed the requirements outlined for West Virginia.

Thank you for your consideration.

Sincerely,

Patrick Barber, PhD  
President – BenchLab Solutions

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## Executive Summary

### Company Background

BenchLab LLC is headquartered in Middletown, Maryland. Established in 2024 with team members who, on average, have 15 years of experience in developing and implementing document and information management systems for health, research, and state municipalities.

BenchLab is a small business currently employing 25 team members in the US and Canada. We are driven by the desire to help our clients set up, maintain, and support their data, in addition to ensuring our solutions provide real-time, easy-access to the data.

### Proposal Overview

BenchLab LLC proposes **BlueLot** as a purpose-built IIS solution for West Virginia. Our approach combines immediate operational capabilities with strategic development toward comprehensive CDC IIS Functional Standards compliance.

Unlike traditional IIS vendors offering pre-packaged solutions, BenchLab commits to developing functionality specifically tailored to West Virginia's unique requirements, ensuring every feature directly supports your public health mission.

### Key Differentiators

- Purpose Built Development: IIS functionality designed exclusively for WV needs
- Proven Foundation: Operational patient portals and data management delivering immediate value
- Compliance: Extensive experience translating to CDC standards

### Phased Implementation

Phase	Key Deliverables
Phase 1 (Months 0-3)	Foundation & Core Data Management: Deploy patient portal, notifications, core reporting. Establish governance and training.
Phase 2 (Months 4-6)	IIS Core Development: Implement immunization data models, HL7 messaging
Phase 3 (Months 7-9)	CDC Standards alignment: Achieve functional standards, compliance
Phase 4 (Months 10-12)	Advanced features: Population health analytics, reminder/recall automation, data exchange



## Section 2: Understanding of Requirements

### Current State

West Virginia recognizes the need for system modernization to better align with evolving CDC IIS Functional Standards, enhance interoperability with healthcare information systems, improve data quality and completeness, and provide advanced decision support capabilities for providers and public health practitioners. The state seeks a solution that not only meets current operational requirements but also positions West Virginia for future public health challenges and federal initiatives.

### West Virginia Immunization Program Goals

BenchLab understands that West Virginia's immunization program pursues multiple interconnected objectives:

- Improve Vaccination Coverage Rates
- Enhance Provider Engagement and Data Quality
- Support Public Health Surveillance and Response
- Ensure Regulatory Compliance and Federal Alignment
- Empower Patients and Families

### Understanding of CDC IIS Functional Standards

We understand that demonstrating alignment with CDC goals and readiness for future federal initiatives strengthens West Virginia's immunization infrastructure.

The 12 major functional areas that incorporates the CDC IIS Standards are:

Functional Area	BenchLab Understanding
<b>1. Locate Records</b>	Find patient immunization records using multiple identifiers and matching algorithms to consolidate fragmented data
<b>2. Create Records</b>	Capture new patient demographics and vaccination events through user interfaces and electronic data exchange
<b>3. Update Records</b>	Modify existing patient and vaccination data to correct errors, add missing information, or reflect status changes

<b>4. Delete Records</b>	Remove erroneous data while maintaining audit trails and data integrity safeguards
<b>5. Query and Reporting</b>	Generate coverage assessments, data quality metrics, provider performance reports, and customized analytics
<b>6. Data Exchange</b>	Exchange immunization data electronically using HL7 v2.5.1 messaging standards with bidirectional communication
<b>7. Decision Support</b>	Provide vaccine forecasting and recommendations based on ACIP schedules, patient history, and clinical factors
<b>8. Vaccine Management</b>	Track publicly funded vaccine inventory and support VFC program administration including ordering and accountability
<b>9. Provider Management</b>	Maintain healthcare provider and organization information including enrollment status, contact details, and program participation
<b>10. Security/Confidentiality</b>	Protect personal health information through encryption, access controls, audit logging, and compliance with HIPAA and state regulations
<b>11. Data Quality</b>	Ensure accuracy, completeness, validity, and timeliness through automated validation, deduplication, and quality monitoring
<b>12. Reminder/Recall</b>	Generate and distribute notifications to patients, parents, and providers for due and overdue vaccinations

BenchLab’s approach will address each functional area through a combination of **Bluelot’s** existing capabilities and development.

### **AIRA Interoperability Requirements**

BenchLab understands that American Immunization Registry Association (AIRA) certification, while not mandatory for initial contract award, represents a critical milestone for West Virginia's IIS modernization. Certification ensures the system can effectively communicate with diverse healthcare information systems including EHRs from major vendors (Epic, Cerner, Allscripts),

pharmacy management systems, and public health surveillance platforms. This interoperability reduces provider burden, improves data quality, and positions West Virginia for participation in national immunization data exchange initiatives.

**BenchLab commits to pursuing AIRA certification as a core component of our implementation plan.** Our Phase 3 development activities specifically target AIRA requirements, with formal testing scheduled for Month 16 and certification expected by Month 18 of the project timeline. This commitment demonstrates our dedication to meeting nationally recognized interoperability standards and ensuring West Virginia's IIS can effectively participate in health information exchange networks.

### **Public Health Data Management Challenges**

BenchLab recognizes the unique challenges inherent in public health data management that distinguish immunization information systems from other healthcare IT solutions:

- Data Completeness and Timeliness
- Data Quality and Standardization
- Privacy and Security Balance
- System Scalability and Performance

Managing nearly 32 million vaccination records for approximately 3 million patients, while supporting over 14,000 possible concurrent users demands a robust technical architecture and performance. BlueLot's cloud-based infrastructure provides the scalability to accommodate peak loads of vaccination campaigns.

### **Integration and Interoperability**

BenchLab recognizes the importance of operating within a complex ecosystem of healthcare and public health information systems such as:

- EHR systems
- Pharmacy Management systems
- Federal Public Health systems
- State Health Information exchange

### **BenchLab's Commitment to Partnership**

BenchLab views this engagement as a long-term partnership investment in West Virginia's public health infrastructure. Our success depends upon West Virginia's success. We plan to achieve this by:

- Transparent communication regarding capabilities, timelines, and challenges
- Continuous stakeholder engagement through development and implementation
- Direct expertise specifically targeted towards the project
- Dedication of BenchLab leadership attention and oversight

### **Section 3: Technical Approach**

#### **BenchLab's Approach**

Leveraging our extensive experience in developing and implementing Laboratory Information Management Systems, BenchLab LLC offers solutions that integrate and interface seamlessly with existing systems and processes to streamline data tracking, management, and reporting; providing clients with the tools they need to improve accuracy, productivity, and decision-making.

With a focus on customization and user support, BenchLab LLC ensures that each solution is tailored to the unique needs of our clients, backed by training and ongoing technical support to maximize the system's potential.

Our staff includes Software Developers, Project Managers, and Business Analysts - all of whom have received formal degrees in a scientific field (Chemistry, Biology, etc), and/or Computer Science, and Information Systems. Additionally, our staff specialize in scientific information systems used in Laboratory, Health, Clinical, and Research spaces.

#### **Proposed Solution**

BenchLab recommends using BlueLot for the proposed solution. BlueLot is a configurable IIS which was developed by BenchLab LLC to be fully customizable to provide ONLY the features that the client needs for their operation without the clutter of modules or features that the client does not need.

Further technical details of the BlueLot data management system are provided in a later section of this proposal.

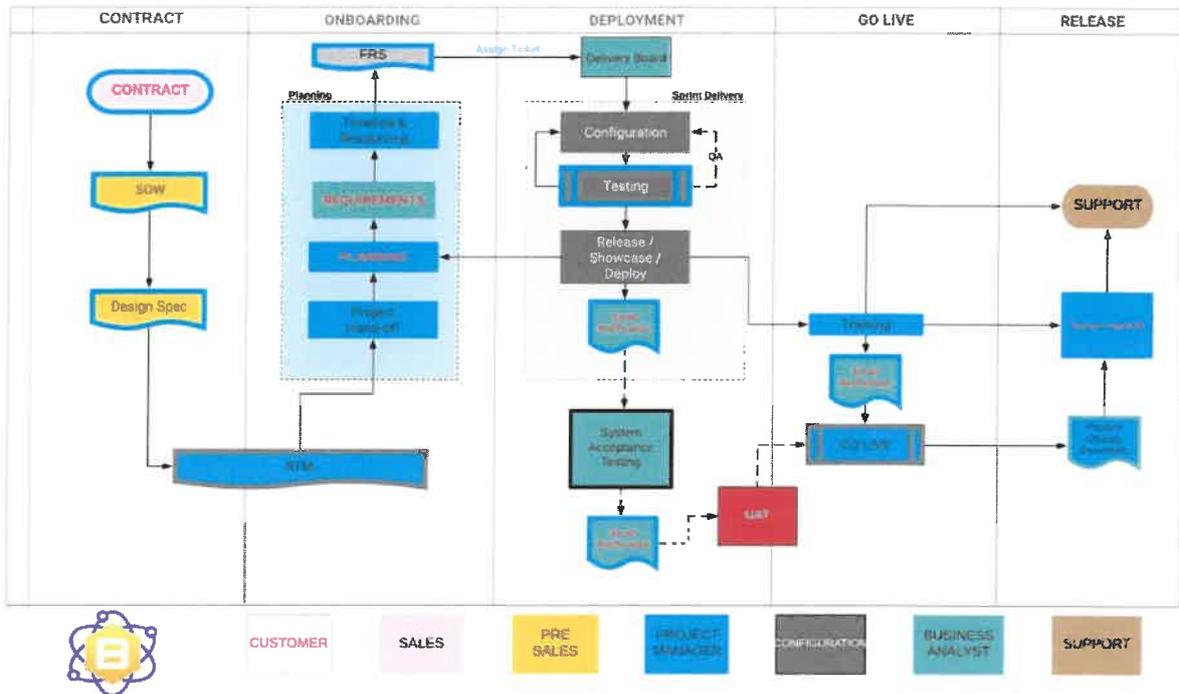
## **Proposed Plan**

BenchLab LLC's proposed plan uses a methodical, software development best practices approach to each software implementation. We have successfully applied this approach in all similar engagements to our client's satisfaction.

The proposed plan is as follows:

1. **Identify Business Stakeholders**
  - BenchLab LLC will begin by identifying the key stakeholders, such as administrators, the IT department, users, the finance department for budgeting, and the training department for collaboration with training personnel.
2. **Interview to Determine Business Case**
  - BenchLab LLC will conduct interviews with stakeholders using proper documentation to analyze their needs, pain points, and vision for the system.
3. **Identify Subject Matter Experts**
  - BenchLab LLC will identify the SMEs, such as the specific users, IT specialists and other relevant personnel who can provide insight into the technical requirements.
4. **Project Timeline and Project Plan**
  - BenchLab LLC will provide a Project Timeline and Plan for review and approval.
5. **User Requirements & Functional Requirements**
  - BenchLab LLC will create a User Requirements Specification (URS) based on the requirements listed in the solicitation. The user requirements are then translated into a Functional Requirements Specification (FRS). Functional Requirements detail what the system should do and how it should behave under certain conditions. The FRS describes the specific functionalities or behaviors that a system must perform to satisfy user needs, business requirements, and stakeholder expectations.
6. **Gap Analysis of Processes**
  - BenchLab LLC will identify gaps, if any, between current processes and desired functionalities outlined in the URS and present the findings, obtain feedback, and finalize the gap analysis document.
7. **Establish Project Team, Project Delivery Process, and Training**
  - BenchLab LLC will conduct training sessions for project team members and end-users on the new Solution. Additionally, we will assign roles including the project manager, business analyst, and SMEs responsible for different aspects of the project.
8. **Create Project Plan and Project Delivery Documents**
  - BenchLab LLC will develop a comprehensive project plan that outlines tasks, timelines, milestones, and responsibilities.

- BenchLab LLC will work with our client to help define required resources to create an approved RACI (Responsible-Accountable-Consulted-Informed) Matrix

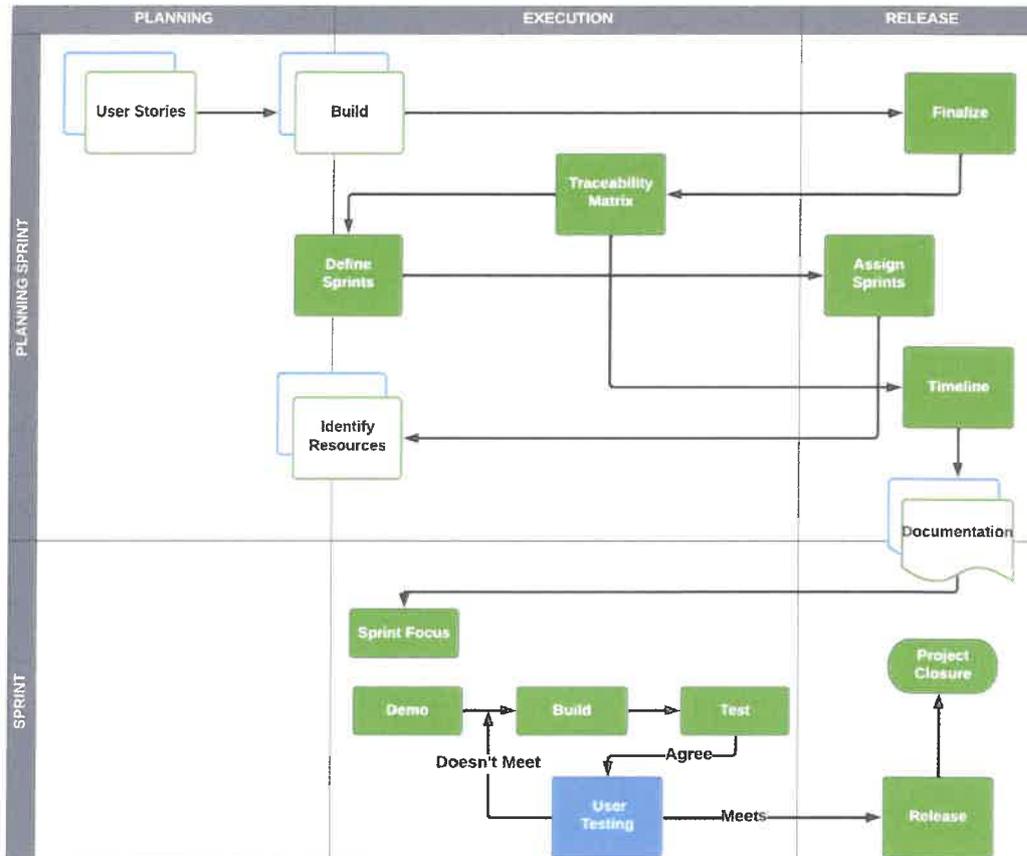


## 9. Implementation Plan

- Document User Requirements Specification (URS)
- Document Functional Requirements Specification (FRS)
- Score Requirements inside Requirement Traceability Matrix
- Create Project Plan defining RACI, Timeline and Resources
- Create Sprint Plan (Agile Methodology listed below)
- Assign development tickets
- Schedule meeting occurrences
- Execute Scrum Development Protocols
- Build
- Demo
- User Test
- Release
- User Acceptance Testing (UAT) - Validation
- Software Testing and Verification Summary
- Training Plan
- Release Management Plan
- Support Plan
- Project Closure Documents
- Change Management Plan, if necessary

- BenchLab LLC will define the project scope, objectives, and the approach for implementation under the oversight of the client.
- Development is based on Agile Methodologies with bi-weekly or tri-weekly sprints.

## Agile Sprints



- BenchLab LLC will work alongside business SME's to assist with User Acceptance Testing
  - UAT findings will be captured in an Issue Tracker and addressed by the Development team. Bug fixes will be re-tested during the official testing phase.

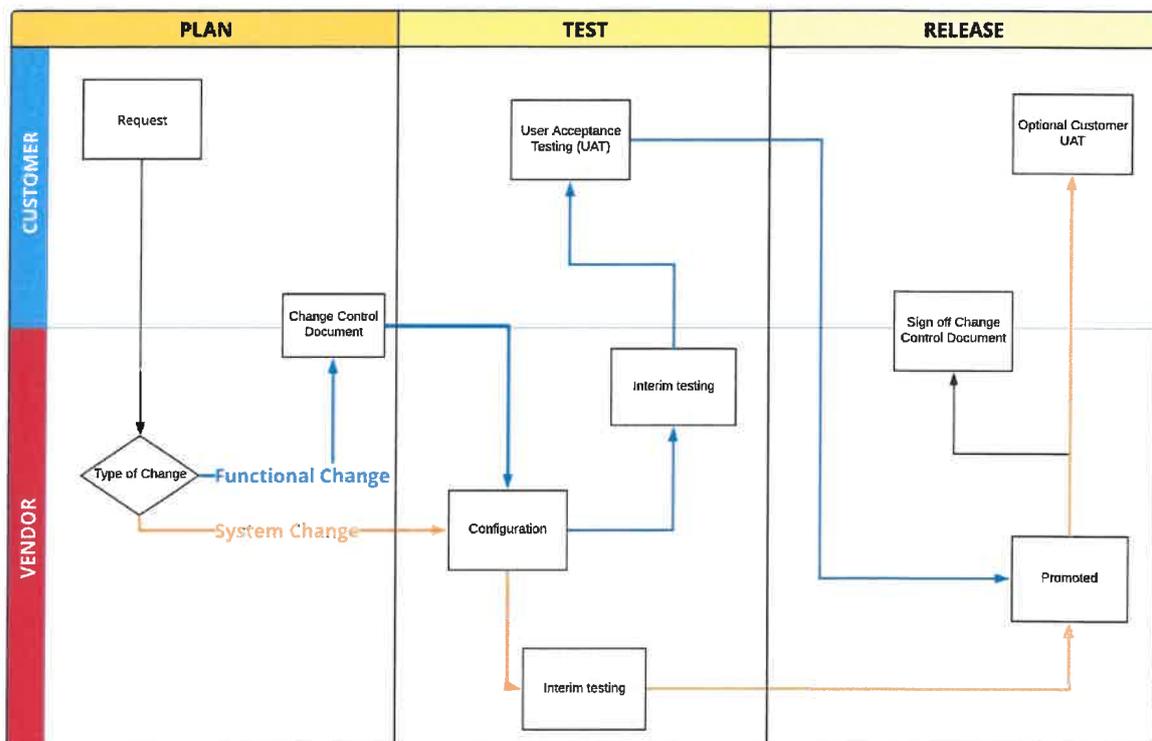
## 10. Testing & Validation Plan

- BenchLab LLC adheres to testing the functionality and performance of the Solution before full deployment.
- Testing and validation will be conducted midpoint and after all development has been completed.
- BenchLab LLC will create and execute test scripts per URS and FRS guidelines.

## 11. Go-Live Plan

- BenchLab LLC can develop a detailed plan for transitioning from the existing ways-of-working to the new Solution, including a contingency plan and rollback procedures. Additionally, BenchLab LLC will include a Business Continuity Plan to outline the procedures to ensure continuous operations during and after the transition.

## Change Control Process



### 12. Support Plan

- BenchLab LLC will establish a support framework including Helpdesk procedures, escalation paths, and ongoing maintenance schedules.

In addition to delivering a robust, tailored system, BenchLab LLC aims to provide professional services by fulfilling the system and licensing requirements, as well as providing all additional professional services, training, and software support. Our collaboration seeks to leverage BenchLab's expertise in innovative technology solutions that enhances our clients' operational efficiency.

## **Section 4: Implementation Plan and Timeline**

### **Project Management Approach**

BenchLab will utilize Agile Scrum methodology. This approach provides the West Virginia project team with regular visibility through:

- **2-week sprint cycles:** Development organized into two-week iterations with clear goals
- **Daily Stand-Up Meetings:** 15 minute daily coordination with development team
- **Sprint Planning:** Detailed planning defining specific work items
- **Sprint Demos:** Stakeholder demonstrations with completed functionality

A dedicated Project Manager with full-time assignment will manage all activities and will coordinate with the West Virginia Department of Health leadership, additionally, the Technical Lead will provide IIS solution architecture oversight and reporting.

### **Project Timeline**

BenchLab proposes a 9-12 month implementation in the four phases previously described. A finalized timeline will be determined after project scope completion. A summary is as follows:

- **Month 0-1:** Project kickoff, scoping, requirements gathering, environment setup
- **Months 0-3:** Core platform deployment, patient portal, basic reporting, training, Phase 1 go-live
- **Months 4-6:** Immunization data model, HL7 messaging, provider workflows, data migration, complete Phase 2
- **Months 7-9:** CDC standards compliance, AIRA certification pursuit, CDSi integration, complete Phase 3
- **Months 10-12:** Advanced analytics, optimization, closeout

### **Testing and Validation**

Comprehensive testing includes:

- Unit testing
- Integration testing
- System testing
- User Acceptance testing

## Section 5: Compliance Matrix

This compliance matrix provides responses to RFP Section 4.2 requirements, indicating current BlueLot IIS capabilities, development plans, and compliance phase.

Requirement	BenchLab Response
4.2.1.1.1 Secure IIS with Policies	<p><b>Current:</b> Role-based access control, audit logging, TLS encryption, MFA support, HIPAA security policies</p> <p><b>Development:</b> IIS-specific policies, consent management, SOC 2 Type II pursuit</p> <p><b>Phase:</b> Phase 1 (Month 3) core security; Phase 3 (Month 9) enhanced policies; Phase 4 (Month 12) SOC 2</p>
4.2.1.1.2 Technical Infrastructure	<p><b>Current:</b> Cloud architecture, elastic scalability, load balancing, automated backup/DR</p> <p><b>Development:</b> Size for WV scale (14k users, 32M records), performance optimization, capacity testing</p> <p><b>Phase:</b> Phase 1 (Month 3) infrastructure deployed; ongoing optimization</p>

BenchLab will abide by each deliverable as listed in Attachment I, as well as all provided attachments from the solicitation (Attachment A through I).

### CDC Based Goals

- Data Exchange (HL7): Implement HL7 immunization messaging per CDC Guide
- Decision Support: Phase 2 basic forecasting, Phase 3 CDC CDSi integration for ACIP compliant forecasting

## **Attachment B: Baseline IIS Requirements Compliance Response**

BenchLab LLC thoroughly reviewed the Requirements Traceability Matrix (RTM) in **Attachment B**. The comprehensive functional and non-functional requirements across 10 IIS functional areas will be addressed through a combination of current capabilities, planned configurations, and targeted development within our 9-12 month roadmap. **Please refer to the included attachments following this page.**

### **Approach**

- **Current Capabilities:** BlueLot's platform provides functionality for user management, data access/reporting, security controls, and administrative functions. These are production ready and can be aligned with West Virginia's specific requirements.
- **Platform Configuration:** BlueLot's architecture allows rapid adaptation to specific needs including immunization data models, vaccine code sets, VFC program tracking, and provided workflows.
- **Targeted Development:** Where gaps are identified, BenchLab can apply targeted development to address the issues.

### **BlueLot Key Strengths**

- **User Management & Access Control:** Comprehensive role based access control, multi-factor authentication, single sign-on integration, audit logging, and session management directly addresses Attachment B requirements
- **Data Access & Reporting:** BlueLot's flexible reporting engine, portal, dashboards, and multiple export formats provide strong foundation for IIS-specific coverage assessment, data quality and accountability reporting
- **Non-Functional Requirements:** BenchLab LLC applies rigorous security practices, HIPAA compliance framework, encryption standards, disaster recovery capabilities, and optimization meeting or exceeding Attachment B specifications.

### **Identified Gaps and Development**

Any identified gaps will be addressed through Phased development within the project timeline.

### **Compliance Summary**

BlueLot targets a phased approach that will provide IIS functionality, HL7 messaging, provider workflows, data migration, CDC compliance, AIRA certification pursuit, CDSi integration, and a complete system for West Virginia. BenchLab LLC commits to full transparency regarding the implementation approach and realistic timelines.

**Attachments and Supporting Documentation per  
Attachment B**

## **Section 6: Team Qualifications and Experience**

### **Company Background**

BenchLab LLC is a scientific solutions based company specializing in health information management systems for organizations operating in highly regulated environments. BenchLab combines deep regulatory compliance knowledge with modern software development expertise.

### **Company Information**

- Legal Name: BenchLab LLC
- Headquarters: 13 Caroline Drive, Middletown, MD 21769
- Phone: (301) 276-7978
- UEI: RS8HS92TH4S5, Cage Code: 9WFD2, DUNS: 062769713

### **Key Personnel**

Our project team combines BenchLab's regulatory and project management expertise with our operational capabilities:

#### **Patrick Barber, PhD - Project Executive & Advisor- West Virginia native**

- **Role:** 20+ years LIMS experience. Overall project oversight, regulatory compliance, quality assurance, LIMS/Software implementation Advisor

#### **David Jallad - Project Manager**

- **Role:** 15+ years software experience. Project management, Implementation, and organization

#### **Anthony Forte Jr - Senior Business Analyst - West Virginia native & resident**

- **Role:** Oversight, Requirements, and Validation. 30 years industry experience (microbiology, chemistry, compliance, software)

#### **Alex Bodine - Software Engineer Lead**

- **Role:** Integrations, configurations, software developer, 10+ years industry experience

#### **Gregory Barbe - Systems Administrator/Development**

- **Role:** LIMS integrations, configurations, software developer, 20+ years industry experience

## Section 7: References

<b>Name of the Company</b>	<b>Arcellx</b>
Location of Project	Gaithersburg, MD
POC Name & Title	Faith Griffin, Director
POC Email	fgriffin@arcellx.com
Your Role (Prime or Sub)	Prime
Project Dates	01/01/2024 - Present
Contractual Award	\$300,000
Were you Terminated from this Contract?	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	
Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services and project management for multiple LIMS and ELN products.	

<b>Name of the Company</b>	<b>Astellas</b>
Location of Project	Sanford, NC
POC Name & Title	Victor Lignes, Business Information Manager (MfgX)
POC Email	victor.lignes@astellas.com
Your Role (Prime or Sub)	Prime
Project Dates	10/01/2023 - 10/31/2025
Contractual Award	\$950,000
Were you Terminated from this Contract?	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	

LIMS/ELN Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services, technical writing, reports development, validation for multiple domains within a global company.

<b>Name of the Company</b>	<b>Certified Group</b>
Location of Project	Burbank, CA
POC Name & Title	Jennifer Sawkins, Vice President
POC Email	jennifer.sawkins@certifiedgroup.com
Your Role (Prime or Sub)	Prime
Project Dates	12/01/2023 - 04/04/2025
Contractual Award	\$780,000
Were you Terminated from this Contract?	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	
LIMS/ELN Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services, technical writing and project management within a global company.	

<b>Name of the Company</b>	<b>Solvias</b>
Location of Project	North Carolina
POC Name & Title	Erika Gill
POC Email	erika.gill@solvias.com
Your Role (Prime or Sub)	Sub
Project Dates	01/02/2025 - current
Contractual Award	\$597,000
Were you Terminated from this Contract?	No

<b>Narrative Description of General Scope of Project / Other than Management:</b>
LIMS and ELN implementation, Global Project Management, QMS support, Standards & Reagents Inventory Manager (SRIM), Project Sample Management Process, Equipment Visual Workflow, Investigations, Stability Module, Data Trending- including a custom Stability Shelflife Regression tool and NWA Charting. Additionally, BenchLab is performing Gap Assessments, Documentation (SOPS, Work Instructions, Qualification Protocols, and additional supporting documentation), and Change Control.

<b>Name of the Company</b>	<b>Safe Food Alliance</b>
<b>Location of Project</b>	Kingsburg, California
<b>POC Name &amp; Title</b>	Derek Ramirez
<b>POC Email</b>	derekr@safefoodalliance.com
<b>Your Role (Prime or Sub)</b>	Prime
<b>Project Dates</b>	July 2025- Present
<b>Contractual Award</b>	\$362,900
<b>Were you Terminated from this Contract?</b>	No
<b>Narrative Description of General Scope of Project / Other than Management:</b>	
Managed services and various services.	

# Certificate of Liability Insurance



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
04/08/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Hiscox Inc. 5 Concourse Parkway Suite 2150 Atlanta GA, 30328	<b>CONTACT NAME:</b> PHONE (A/C No. Ext): (888) 202-3007 FAX (A/C. No.): E-MAIL ADDRESS: contact@hiscox.com
	INSURER(S) AFFORDING COVERAGE INSURER A: Hiscox Insurance Company Inc NAC# 10200 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:

**COVERAGES**      **CERTIFICATE NUMBER:**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

LINE	TYPE OF INSURANCE	ADDITIONAL COVERAGES	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXP. DATE (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Each Occurrence) \$ MED EXP (Any one person) \$ PERSONAL AND ADY INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COM/PRO AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALLOWED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NO-OWNED AUTOS					COMBINED SINGLE LIMIT (Each Occurrence) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETARY PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED? (Mandatory in NH) Yes, specify limit:      No, specify limit: DESCRIPTION OF OPERATIONS:	<input type="checkbox"/> Y/N <input type="checkbox"/> N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.I. EACH ACCIDENT \$ E.I. DISEASE - EA EMPLOYEE \$ E.I. DISEASE - POLICY LIMIT \$
A	Professional Liability		P103.226.698.1	04/08/2024	04/08/2025	Each Claim: \$ 1,000,000 Aggregate \$ 1,000,000

DESCRIPTION OF OPERATIONS (LOCATIONS / VEHICLES) (ACORD 101, Additional Remarks Schedule, or as attached from other applicable requirements)

<b>CERTIFICATE HOLDER</b>  	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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## **Representations and Certifications**

### **52.212-3 Offeror Representations and Certifications--Commercial Products and Commercial Services (NOV 2023)**

The offeror has completed the annual representations and certifications electronically via the SAM website accessed through <https://www.sam.gov>. After reviewing the SAM database information, the offeror verifies by submission of this offer that the representation and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications—Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), as of the date of this offer and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs N/A.

(End of provision)

### **52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment (Nov 2024)**

(d) Representations. The Offeror represents that—

(1) It  will,  will not provide covered telecommunications equipment or services to the Government in the performance of any contract, subcontract or other contractual instrument resulting from this solicitation. The Offeror shall provide the additional disclosure information required at paragraph (e)(1) of this section if the Offeror responds "will" in paragraph (d)(1) of this section; and

(2) After conducting a reasonable inquiry, for purposes of this representation, the Offeror represents that—

It  does,  does not use covered telecommunications equipment or services, or use any equipment, system, or service that uses covered telecommunications equipment or services. The Offeror shall provide the additional disclosure information required at paragraph (e)(2) of this section if the Offeror responds "does" in paragraph (d)(2) of this section.

(End of provision)

### **52.204-26 Covered Telecommunications Equipment or Services--Representation (OCT 2020)**

(c) Representations.

(1) The Offeror represents that it  does,  does not provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

(2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it  does,  does not use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

(End of provision)

**Representation by Corporations Regarding Delinquent Tax Liability or a Felony Conviction under any Federal Law (Feb 2016)**

(a) As required by sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235), and similar provisions, if contained in subsequent appropriations acts, the Government will not enter into a contract with any corporation that—

(1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless an agency has considered suspension or debarment of the corporation and made a determination that suspension or debarment is not necessary to protect the interests of the Government; or

(2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless an agency has considered suspension or debarment of the corporation and made a determination that this action is not necessary to protect the interests of the Government.

(b) The Offeror represents that—

(1) It is  is not  a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and

(2) It is  is not  a corporation that was convicted of a felony criminal violation under a Federal law within the preceding 24 months.

Patrick Barber,  
President, BenchLab LLC  
Office: (301) 276-5314  
Email: [pbarber@benchlabsolutions.com](mailto:pbarber@benchlabsolutions.com)

Status	Req. #*	Capability/Attribute	*** Requirement: The IIS must/should have...	Comments	Reviewer notes	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.
Updated from the previous version of the RTM or newly added.	[Req. ID]	[Capability/attribute name, e.g., "System Configuration"]	[high-level requirement]	-Suggested recommendations for the requirement. -Indication of relationship to a priority cross-functional need such as mass vaccination or school reports.	[Reviewer notes related to: - Organization of the requirement (in terms of its associated capability and/or function) - Wording of the requirement - Misc thoughts]	[Draft priority designation, e.g. "E"]		
Updated from the previous version of the RTM or newly added.	[Req. ID]	[Capability/attribute name, e.g., "System Configuration"]	[detailed requirement]	-Suggested recommendations for the requirement. -Indication of relationship to a priority cross-functional need such as mass vaccination or school reports.	[Reviewer notes related to: - Organization of the requirement (in terms of its associated capability and/or function) - Wording of the requirement - Misc thoughts]	[Draft priority designation, e.g. "E"]		

\*Numbering/identification of individual requirements will occur at the very end of the review and revision process, once requirements are final.

\*\*Priority designations:

E: Essential: Baseline, critical requirement reflective of core functionality/attribute for a viable IIS as defined by CDC.

O: Optional: Not essential for all IIS as defined by CDC.

\*\*\* Rows highlighted in blue indicate a high-level requirement

Req. #	Capability	Requirement: The US must/should...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization, No
	Hierarchy	ability to establish the IIS hierarchy to associate and manage relationships between entities			E	Yes with configuration
	Hierarchy	ability to associate users to a facility			E	Yes with configuration
	Hierarchy	ability to associate clinicians to a facility			E	Yes with configuration
	Hierarchy	ability to associate facility/facilities to an organization			E	Yes with configuration
	Hierarchy	ability to establish geographic jurisdictional hierarchies			E	Yes with configuration
	System Configuration	ability to aggregate data across user-defined hierarchies			E	Yes with configuration
	System Configuration	ability to maintain inventory availability in IIS visible to authorized users			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to maintain separate VFC supplied inventory in the IIS			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to maintain separate jurisdiction supplied inventory			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to maintain separate private stock inventory			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to manage code sets			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to update NDC codes			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to update CVX codes			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to update MVX codes			E	Yes with configuration
	System Configuration	ability to configure default values to minimize data input			E	Yes with configuration
	System Configuration	ability to display an error message in the user interface when minimum information required is not complete			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., SmartyStreets)			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., LookNeis)			O	Yes
	System Configuration	ability for jurisdictional admin to modify facility types according to Immunization program descriptions and CDC VFC Program descriptions			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to configure rules governing data validation of incoming HL7 messages			O	Yes with configuration
	System Configuration	ability to configure an authorization agreement as per jurisdictional policy			O	Yes with configuration
	System Configuration	ability to configure a user agreement as per jurisdictional policy			O	Yes with configuration
	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 with configuration
	System Configuration	ability to add patient priority group indicators	Partic		E	Yes with configuration
	System Configuration	ability to modify patient priority group indicators	Partic		E	Yes with configuration
	System Configuration	ability for jurisdictional admin to manage business rules related to data quality			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to specify business rules for monitoring data quality			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to modify business rules for monitoring data quality			E	Yes with configuration
	System Configuration	ability to configure the organization enrollment form			E	Yes with configuration
	System Configuration	support rules-based logic to suggest approval or rejection of enrollment form based on review of completed fields			E	Yes with configuration
	System Configuration	ability to manage rules-based logic for approval or rejection of enrollment form			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to create enrollment forms based on program requirements			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to modify an enrollment form			E	Yes with configuration
	System Configuration	ability to auto-populate existing user information in the IIS with the information on the enrollment form when creating a new facility in the IIS			O	Yes with configuration
	System Configuration	ability to auto-populate the organization information in the IIS with information on the enrollment form when creating a new organization in the IIS			O	Yes with configuration
	System Configuration	ability for jurisdictional admin to configure vaccine forecasting business rules			E	Yes with configuration
	System Configuration	ability to apply effective dates to vaccine rules			O	Yes with configuration
	System Configuration	ability to incorporate new vaccines per ACP into the forecasting algorithm			E	Yes with configuration
	System Configuration	ability to support a record search algorithm to return "best matches"			E	Yes with configuration
	System Configuration	ability for jurisdictional admin to configure the number of search results to be displayed per jurisdictional policy			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.g., address, phone number, mother's maiden name, Medicaid ID			E	Yes with configuration
	System Configuration	ability to open multiple screens simultaneously within the application			O	Yes with configuration
	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 deactivate 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 attributes			E	Yes
	System Alerts	ability for jurisdictional admin to manage system alerts			E	Yes with configuration
	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 application			O	Yes
	System Alerts	ability for jurisdictional admin to add global messages			E	Yes with configuration
	System Alerts	ability for jurisdictional admin to edit global messages			E	Yes with configuration
	System Alerts	ability for jurisdictional admin to deactivate global messages			E	Yes with configuration

Vendor comment(s)

If Yes with customization, indicate the anticipated cost and timeline for development and release.

This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
Vaccine inventory management will be configured to track receipts, doses, and wastage by facility and funding source. Cost: Included. Timeline: Month 6-8
VFC inventory tracking will be configured with separate bins and automated reconciliation reporting. Cost: Included. Timeline: Month 6-8
Vaccine inventory management will be configured to track receipts, doses, and wastage by facility and funding source. Cost: Included. Timeline: Month 6-8
Vaccine inventory management will be configured to track receipts, doses, and wastage by facility and funding source. Cost: Included. Timeline: Month 6-8
Vaccine code management will be configured with automated CDC table synchronization and version tracking. Cost: Included. Timeline: Month 2-3
NDC management will be configured with automated CDC table synchronization and version tracking. Cost: Included. Timeline: Month 2-3
CVX management will be configured with automated CDC table synchronization and version tracking. Cost: Included. Timeline: Month 2-3
AVL management will be configured with automated CDC table synchronization and version tracking. Cost: Included. Timeline: Month 2-3
BlueDot supports configurable defaults at global, facility, and user levels.
BlueDot displays context-specific error messages with suggested corrections.
BlueDot implements USPS address standardization and validation via integrated third-party service.
BlueDot implements USPS address standardization and validation via integrated third-party service.
BlueDot provides geocoding/generating latitude/longitude coordinates for geographic analysis.
BlueDot implements USPS address standardization and validation via integrated third-party service.
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data. IIS message will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
BlueDot provides this capability through its comprehensive platform features.
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
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This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
BlueDot provides this capability through its comprehensive platform features.
BlueDot provides this capability through its comprehensive platform features.
BlueDot provides patient search with multi-criteria options including name matching (exact/sounded), DOB, identifiers, and demographic attributes.
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot supports full user account creation with demographics, credentials, role assignments, and facility associations.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
BlueDot implements role-based access control with granular permissions, custom roles, and multi-role assignments.
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
BlueDot provides this capability through its comprehensive platform features.
BlueDot provides this capability through its comprehensive platform features.
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6

Status	Req. #	Capability	Requirement: The IS must/should have...	Reviewer notes	Priority: 1, 0 (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required
		Organization/Facility	ability to search organization/facility information stored in the IS		E	Yes
		Organization/Facility	ability for jurisdictional admin to search organizations/facilities by user-defined parameters		E	Yes
		Organization/Facility	ability to clear and re-enter search criteria when searching for an organization/facility		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized (non-participating) enrolled organization to enroll electronically for participation in the IS		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized organization to add IS enrollment information online		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized or to submit IS enrollment information online		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized or to save partial/complete IS enrollment information		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized or to return to a partially complete IS enrollment information		O	Yes
		Add, Edit, Inactivate	ability to prevent submission of incomplete IS enrollment information when required fields are missing		O	Yes
		Add, Edit, Inactivate	ability to electronically notify the applicant of incomplete IS enrollment information specifying the missing required fields		E	Yes
		Add, Edit, Inactivate	ability to electronically notify applicant that IS enrollment information has been submitted		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized or to edit rejected IS enrollment information		E	Yes
		Add, Edit, Inactivate	ability for applicant from unauthorized or to resubmit a rejected IS enrollment		E	Yes
		Add, Edit, Inactivate	ability to capture electronic signature for enrollment, for an authorization agreement		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to manage organization/facility IS enrollment		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to manage organization/facility IS enrollment status		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to deactivate an organization		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to reactivate an organization		E	Yes
		Add, Edit, Inactivate	ability to store IS enrollment status for an organization/facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to deactivate a facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to reactivate a facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to electronically approve IS enrollment		E	Yes
		Add, Edit, Inactivate	ability to include reason for rejecting IS enrollment of an organization		E	Yes
		Add, Edit, Inactivate	ability to electronically notify the organization that the submitted enrollment was rejected along with the reason		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to manage organization and facility records within the IS		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to add an organization		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to modify an organization record		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to add a facility		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to modify a facility record		E	Yes
		Add, Edit, Inactivate	ability to automatically generate unique facility ID		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to associate a facility to an organization		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to edit association between a facility and organization		E	Yes
		Add, Edit, Inactivate	ability to store multiple unique facility IDs associated with a particular facility (to facilitate matching of facilities between the IS and other data systems)		E	Yes
		Add, Edit, Inactivate	ability to capture a facility's mailing address		E	Yes
		Add, Edit, Inactivate	ability to capture a facility's shipping address		E	Yes
		Add, Edit, Inactivate	ability to enter contact information for the facility contact		E	Yes
		Add, Edit, Inactivate	ability to enter contact information for an optional contact		E	Yes
		Add, Edit, Inactivate	ability to indicate if an organization/facility is a site where immunizations are administered		E	Yes
		Add, Edit, Inactivate	ability to indicate if an organization/facility is a site where vaccines are stored for redistribution		O	Yes
		Add, Edit, Inactivate	ability to save documents (i.e., enrollment/inventory documents, storage and handling, temperature log, waste log, etc.) to specific organization/facility file folder per policy		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to retrieve electronic files from provider file folder		E	Yes
		Add, Edit, Inactivate	ability for jurisdictional admin to record notes related to organization/facility		E	Yes
		Add, Edit, Inactivate	ability to flag an organization as participating in VFC and/or other user-defined vaccine program(s)		E	Yes with configuration
		Add, Edit, Inactivate	ability to retrieve organization/facility information from scanned forms and automatically fill required data fields with retrieved information		O	Yes
		VFC/Vaccine Program	ability for an organization to submit vaccine program enrollment information electronically		E	Yes with configuration
		VFC/Vaccine Program	ability to capture electronic signature for vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to access the vaccine program agreement in a separate window from the vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to provide link to the blank formatted vaccine program enrollment form		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to assign a VFC pin number to a newly enrolled VFC site		E	Yes with configuration
		VFC/Vaccine Program	ability to select the type of certified monitor/in device being used to record temperatures		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that a facility has a certificate of calibration for the temperature monitoring device		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to approve a vaccine program enrollment		O	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to enter an expiration date for a vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that the vaccine program facility has a routine and emergency vaccine management plan		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that a facility participating in VFC has a VFC Coordinator annual training certificate		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to document that a facility participating in VFC has a Backup Coordinator annual training certificate		E	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to add comments during the vaccine program enrollment approval process		E	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to indicate the number of vaccine storage units being monitored		O	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to indicate the types of vaccine storage units being monitored		O	Yes with configuration
		VFC/Vaccine Program	ability to require the vaccine program facility to indicate whether they store Vaxcella and MMRV vaccine		E	Yes with configuration
		VFC/Vaccine Program	ability to enter contact information for the facility VFC/Vaccine Coordinator		E	Yes with configuration
		VFC/Vaccine Program	ability to enter contact information for the facility Backup Vaccine Coordinator		E	Yes with configuration
		VFC/Vaccine Program	ability to enter contact information for the facility vaccine program Agreement Signatory		E	Yes with configuration
		VFC/Vaccine Program	ability to capture the day of the week that vaccine program facility may receive vaccine shipments		E	Yes with configuration
		VFC/Vaccine Program	ability to capture the time that a vaccine program facility may receive vaccine shipments		E	Yes with configuration
		VFC/Vaccine Program	ability to automatically turn off vaccine ordering capabilities for a facility that does not have an up-to-date vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to capture a required information for VFC clinician (last name, first name, NPI, medical license number, NPI number, still active with facility, are they a signatory, specialty (FP, Peds) during the enrollment process		E	Yes with configuration
		VFC/Vaccine Program	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 with configuration
		VFC/Vaccine Program	ability for staff to retrieve electronic files from organization/facility file folder		O	Yes with configuration
		VFC/Vaccine Program	ability to automatically validate clinician license number against Professional Licensing Agency record database		O	Yes with configuration
		VFC/Vaccine Program	ability to submit vaccine program re-enrollment data electronically		E	Yes with configuration
		VFC/Vaccine Program	ability to electronically notify a facility VFC/Vaccine program coordinator of an upcoming need for VFC/Vaccine program re-enrollment		O	Yes with configuration
		VFC/Vaccine Program	ability for the jurisdictional vaccine program admin to modify the date for online renewal electronic notifications for each vaccine program facility		O	Yes with configuration
		VFC/Vaccine Program	ability to suspend ordering capabilities for a facility pending approval of vaccine program enrollment		E	Yes with configuration
		VFC/Vaccine Program	ability to reactivate ordering capabilities for a facility when a vaccine program enrollment is approved		E	Yes with configuration
		Organization/Facility	ability to send electronic communications to organization/facility contacts		E	Yes
		Organization/Facility	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	ability to send electronic communications directly from the IS		E	Yes with configuration
		Organization/Facility	ability to send electronic communications directly from the IS to multiple recipients		O	Yes
		Organization/Facility	ability to notify more than one user at a participating vaccine program facility of any vaccine program notification		O	Yes
		Organization/Facility	ability for the jurisdictional vaccine program admin to customize vaccine program enrollment alerts to participating vaccine program facilities when needed		O	Yes
		Organization/Facility	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	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



Status	Req #	Capability	Requirements: The IIS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization, No "Comment required"
		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
		User Search	ability for organization admin to view all user accounts associated with their organization			E	Yes
		User Search	ability to view users by user defined criteria			E	Yes
		Add, Edit, Inactivate User	ability for admin to manage user accounts			O	Yes
Addm		Add, Edit, Inactivate User	ability to track the progress of a new user registration			E	Yes with configuration
		Add, Edit, Inactivate User	ability for admin to add new users			O	Yes with configuration
		Add, Edit, Inactivate User	ability for admin to modify user accounts			E	Yes with configuration
		Add, Edit, Inactivate User	ability for admin to deactivate user accounts			E	Yes with configuration
		Add, Edit, Inactivate User	ability for jurisdictional admin to deactivate multiple accounts in one transaction			E	Yes with configuration
		Add, Edit, Inactivate User	ability for organization admin to deactivate user accounts associated with their organization			O	Yes with configuration
		Add, Edit, Inactivate User	ability to store reason for inactivation of user account			E	Yes with configuration
		Add, Edit, Inactivate User	ability for jurisdictional admin to reactivate an inactivated account			E	Yes with configuration
		Add, Edit, Inactivate User	ability to electronically notify a user that their account is locked (inaccessible) as per jurisdictional security policy			O	Yes with configuration
		Add, Edit, Inactivate User	ability to electronically notify a user that their account is inactive			O	Yes with configuration
		Add, Edit, Inactivate User	capture clinician activity status (out of state, loss of certification, change of practice status, other)			O	Yes with configuration
		Add, Edit, Inactivate User	ability for jurisdictional admin to assign a role to authorized users			E	Yes with configuration
		Add, Edit, Inactivate User	ability for organization admin to assign a role to authorized users within their organization			E	Yes with configuration
		Authentication & Authorization	ability to authenticate user			E	Yes with configuration
		Authentication & Authorization	ability to access the system through an authorized username and password			E	Yes with configuration
		Authentication & Authorization	ability to support access via single sign-in for jurisdictional users			O	Yes with configuration
		Authentication & Authorization	ability to switch between multiple organizations			O	Yes with configuration
		Authentication & Authorization	ability to view jurisdictional policy agreements			E	Yes
		Authentication & Authorization	support multi-factor authentication per jurisdictional policy			E	Yes
		Password Management	ability to generate electronic notification to authorized user of account credentials			O	Yes with configuration
		Password Management	ability to electronically notify authorized users of their username			E	Yes with configuration
		Password Management	ability to electronically notify authorized users of their temporary password in a separate notification			E	Yes with configuration
		Password Management	ability to generate electronic notification at periodic intervals to authorized users of their pending account password expiration			E	Yes with configuration
		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 with configuration
		Password Management	ability to support temporary password which will be required to change during initial login			E	Yes with configuration
		Password Management	ability to support temporary password which will expire in X number of days determined by policy			E	Yes with configuration
		Password Management	ability for users to change their own passwords per program/jurisdiction security policy			E	Yes with configuration
		Password Management	ability for users to reset their password per program/jurisdiction security policy			E	Yes with configuration
		Password Management	ability to prompt users to change their password at time intervals per program/jurisdiction security policy			E	Yes with configuration



Status	Req. #	Capability	Requirement: The IS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, No (with customization), No Comment required	Vendor comments: If Yes with customization, indicate the anticipated cost and timeline for development and testing.
Onboarding		ability to onboard organizations/facilities to facilitate electronic data exchange				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability to track an organization's facility progress through the onboarding process				O	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability to capture EHR system specifications details				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Onboarding		ability to create a unique username to assign to the organizations/facilities during the test phase				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Onboarding		ability to create a unique password to assign to the organizations/facilities during the test phase				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		ability to electronically alert the vendor or organization when the certificate for transport is going to expire in X time period				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		ability to store digital certificate information				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Onboarding		ability to validate that the transport layer between the test site and IS is functional				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Onboarding		ability to validate system connectivity prior to the submission of test data				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Onboarding		ability to identify data formatting errors during testing				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		ability to provide test message submission summary report to the EHR vendor				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		ability for EHR vendor to view details regarding the processing of test data in terms of errors and warnings in the messages				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Onboarding		ability for IS authorized staff to review and approve onboarding forms				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability for IS staff to review and reject onboarding forms				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability for applicant to edit a rejected onboarding application				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability for applicant to save a rejected onboarding application				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability for applicant to resubmit a rejected onboarding application				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Onboarding		ability to compare onboarding application information to current records to determine most current data				E	Yes with configuration	Provider onboarding workflow will be configured supporting electronic registration and approval tracking. Cost: Included. Timeline: Month 4
Interfaces		ability to interface with other systems to facilitate electronic data sharing/exchange per jurisdictional policy				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4
Interfaces		ability to interface with the Immunization Gateway				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		ability to interface with an application that facilitates patient scheduling	Particularly			E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to exchange data with CDC Vaccine Tracking System (VTrckS) based on most current CDC B&S Specifications				E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Interfaces		ability to order vaccine via electronic interface with VTrckS				E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Updated		ability to receive vaccine inventory/shipping information				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Updated		ability to batch export vaccine inventory for submission to VTrckS				E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Updated		ability to batch import vaccine ordering information for submission to VTrckS				E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Updated		ability to batch export facility information				E	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Updated		ability to batch import return and usage data to VTrckS				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Added		ability to use the VTrckS-API for file exchange between the IS and VTrckS based on CDC requirements and API file specifications				O	Yes with configuration	VTrckS integration will be configured for vaccine ordering and inventory reporting. Cost: Included. Timeline: Month 8-9
Interfaces		ability to receive data through an interface with jurisdictional vital records system				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to update IS data from Vital Records for birth events				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to update IS data from Vital Records for death events				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to update IS data from Vital Records for adoption events				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to update IS data from Vital Records for name change events				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to detect if a newborn record is a potential duplicate in the IS				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to use new Vital Record data for matched records to update patient demographic data				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to update the IS with date of death from Vital Records data				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Interfaces		ability to prevent updates to IS records				O	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Data Exchange		ability to support real-time data exchange per the CDC HL7 Implementation Guide				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to process an HL7 message				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to respond to an HL7 message				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to create an HL7 message				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to capture IS Core Data Elements				E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Data Exchange		ability to store IS Core Data Elements				E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		ability to accept last prior version of HL7 messages	In the event a new HL7			E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added. Cost: Included. Timeline: Month 4-6
Data Exchange		ability to manually correct a submitted record and resubmit for processing				O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Data Exchange		ability to support data exchange in non-HL7 format				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to import bulk patient demographic information into IS	Particularly			E	Yes	BlueDot manages comprehensive demographics including name, DOB, gender, race, ethnicity, address, and identifiers.
Data Exchange		ability to import bulk immunization information into IS				E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Added		ability to support routine, seasonal, and emergency vaccination files (aggregate and de-identified)				E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Added		ability to monitor and troubleshoot data exchange				O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Data Exchange		ability to view VDU messages submitted by an organization				E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Data Exchange		ability to view HL7 messages for an organization within a defined date range per jurisdictional policy				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to view HL7 ACK messages generated for an organization				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to view incoming HL7 CBP messages submitted by an organization				E	Yes with configuration	HL7 v2.5.1 Immunization messaging will be configured per CDC Implementation Guide. BlueDot supports HL7 for lab data; IS messages will be added.
Data Exchange		ability to view RSP messages generated for an organization				E	Yes with configuration	Interoperability capabilities will be configured per CDC and AHA standards. Cost: Included. Timeline: Month 4-8
Data Exchange		ability to log acknowledgement messages indicating warnings and errors				E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Data Exchange		ability to retrieve error or messages within a specified date range by organization				E	Yes	BlueDot displays context-specific error messages with suggested corrections.
Data Exchange		ability to retrieve acknowledgement messages within a specified date range by organization				E	Yes	BlueDot displays context-specific error messages with suggested corrections.
Data Exchange		ability to filter error messages				E	Yes	BlueDot provides this capability through its comprehensive platform features.
Data Exchange		ability to filter acknowledgement messages				E	Yes	BlueDot provides this capability through its comprehensive platform features.
Data Exchange		ability to sort error messages				E	Yes	BlueDot provides this capability through its comprehensive platform features.
Data Exchange		ability to sort acknowledgement messages				E	Yes	BlueDot provides this capability through its comprehensive platform features.

Status	Req. #	Capability	Requirements (The "What/Should have...")	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization, No	Vendor comment(s)
Updated		Patient Matching & Deduplication	ability to prevent duplicate patient records in the database			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to automatically identify incoming patient records as potential duplicates			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to automatically identify existing patient records as potential duplicates			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to automatically consolidate two or more duplicate records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to generate electronic notification of potential duplicates for manual review			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to automatically match an incoming patient record with existing records to avoid a duplicate record being created			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to set thresholds for patient matching			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to view all potential duplicate patient records for an individual patient simultaneously			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for jurisdictional admin to edit thresholds to increase the probability of a match			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for jurisdictional admin to edit thresholds to reduce the probability of a match			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to flag potential duplicate patient records for manual review that cannot be resolved automatically			E	Yes	BlueDot provides comprehensive patient management capabilities.
Updated		Patient Matching & Deduplication	ability to view all potential duplicate patient records simultaneously			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for admin to manually merge patient records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability for organizational/facility user to manually merge patient records from their own organization/facility			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to manually flag two or more patient records as potential duplicates			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to prevent manual review of records previously indicated as "not a duplicate"			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to flag patient as "not a duplicate" during manual review			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to maintain "not a duplicate" flag for resolved patient records			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to select data elements from the patient records to maintain within the consolidated record			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to retain "see one and" records for reference			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Patient Matching & Deduplication	ability to separate patient records that were incorrectly merged			E	Yes	BlueDot provides comprehensive patient management capabilities.
		Vaccination Event Matching & Deduplication	ability to prevent potential duplicate vaccination events at the immunization level			E	Yes with configuration	BlueDot provides comprehensive patient management capabilities.
Updated		Vaccination Event Matching & Deduplication	ability to automatically identify incoming vaccination event as potential duplicates			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to automatically identify existing vaccination events as potential duplicates			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to manually flag potential duplicate vaccination events for manual review			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
Updated		Vaccination Event Matching & Deduplication	ability to identify potential duplicate vaccine records for an individual patient			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
		Vaccination Event Matching & Deduplication	ability to manually merge duplicate vaccination event			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
		Vaccination Event Matching & Deduplication	ability to manually delete a duplicate vaccination event			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
Added		Vaccination Event Matching & Deduplication	ability to automatically consolidate two or more duplicate vaccination events			E	Yes with configuration	Probabilistic matching will be configured using algorithms for name variants, soundex, and configurable thresholds. Cost: Included. Timeline: Month 5-6
Added		Vaccination Event Matching & Deduplication	ability to retain "see one and" or "see consolidated" vaccination events for reference			E	Yes with configuration	Data validation will be configured against CDC code tables and business rules with real-time flagging. Cost: Included. Timeline: Month 4-5
Added		Vaccination Event Matching & Deduplication	ability to separate vaccination events that were incorrectly merged or consolidated			E	Yes with configuration	Data validation will be configured against CDC code tables and business rules with real-time flagging. Cost: Included. Timeline: Month 4-5

Status	Req. #	Capability	Requirement of the IT must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No, *Customize required	Vendor comments (if Yes with customization, indicate the anticipated cost and timeline for development and release.
Updated		Clinical Decision Support	ability to provide immunization clinical decision support according to ACIP recommendations			E	Yes with configuration	Forecasting capabilities will be configured with basic rules (Months 5-6) then full CDS integration (Month 7-8). Cost: Included. Timeline: Month 5-8
		Clinical Decision Support	ability to support a vaccine clinical decision support algorithm aligned with the CDC CDS light			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability for jurisdictional admin to update the CDS rules			E	Yes with configuration	CDC CDS integration will be configured for ACIP-compliant forecasting via RSTH web service. Cost: Included. Timeline: Month 7-8
		Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Child and Adolescent			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Recommended Catch-up			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Adult Immunization Schedule			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Child and Adolescent Immunization Schedule			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Recommended Catch-up Immunization			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Adult Immunization Schedule and a patient's			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to display and highlight vaccines that are due			E	Yes	Blueprint provides this capability through its comprehensive platform features.
		Clinical Decision Support	ability to display and highlight vaccines that are overdue			E	Yes	Blueprint provides this capability through its comprehensive platform features.
		Clinical Decision Support	ability to display an indication when a vaccine series is complete			E	Yes	Blueprint provides this capability through its comprehensive platform features.
		Clinical Decision Support	ability to display vaccine-specific contraindications according to CDC lists of vaccine contraindications			O	Yes	Blueprint provides this capability through its comprehensive platform features.
		Clinical Decision Support	ability to take into account contraindications and precautions in the vaccine forecast			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to take into account evidence of immunity in the vaccine forecast			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to generate a forecast of specific vaccines required for individuals who travel outside the US			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to maintain historical records of effective dates of previous forecast schedules			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Clinical Decision Support	ability to redev an immunization schedule that was appropriate at the time of administration			O	Yes	Blueprint provides this capability through its comprehensive platform features.
		Clinical Decision Support	ability to apply an immunization schedule that was appropriate at the time of administration			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to account for immune globulin in vaccine forecasting			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to create test cases for reuse during user acceptance testing			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to save test cases for reuse during user acceptance testing			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Clinical Decision Support	ability to compare the expected results of the forecasting test case to the actual results observed by the			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to generate patient-specific reminder/recall notifications			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to select one or more vaccines for generating reminder/recall notifications			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to view the date the reminder/recall notice was sent to a patient			O	Yes	Blueprint provides this capability through its comprehensive platform features.
Updated		Reminder/Recall	ability to generate lists of patients in need of a reminder or recall notification by organization			E	Yes	Blueprint provides this capability through its comprehensive platform features.
		Reminder/Recall	ability to generate reminder/recall notifications per consent designation			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to generate patient-specific reminder/recall notices by user-defined parameters			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Reminder/Recall	ability to generate reminder/recall notifications		Particularly relevant	E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to select the age of the cohort when generating reminder/recall notifications			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to print patient-specific reminder/recall notices by user-defined parameters			E	Yes	Blueprint provides this capability through its comprehensive platform features.
		Reminder/Recall	ability to generate patient-specific reminder/recalls in a user-defined format			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability for an end user to generate patient-specific reminder/recalls in accordance with HIPAA and			E	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability for an end user to print patient-specific reminder/recalls in accordance with HIPAA and			E	Yes	Blueprint provides this capability through its comprehensive platform features.
Updated		Reminder/Recall	ability to generate vaccine recall notices by facility based on vaccine name, vaccination date range, and lot			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Reminder/Recall	ability to generate vaccine recall notices by administering provider based on vaccine name, vaccination			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Reminder/Recall	ability to set the limit/number of times a patient will receive a reminder/recall			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Reminder/Recall	ability to modify the limit/number of times a patient will receive a reminder/recall			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
Updated		Reminder/Recall	ability to exclude a patient who has met the limit/number of times to receive a reminder/recall			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to generate a list of phone numbers for patients needing reminder/recall			O	Yes	Blueprint provides this capability through its comprehensive platform features.
		Reminder/Recall	ability to manually review a patient list for a reminder/recall notification			O	Yes	Blueprint provides this capability through its comprehensive platform features.
		Reminder/Recall	ability to flag patients to exclude before sending a reminder/recall notification			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to establish a time interval between reminder/recall notices (e.g., 90 days or 60 days)			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to generate a reminder/recall notifications for patients with an active status for their organization			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to generate reports that include reminder/recall history for specific date range			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to make all reminder/recall data accessible to authorized users for a selected period of time			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Reminder/Recall	ability to aggregate multiple notices going to the same address into one notification			O	Yes with configuration	This capability will be configured during implementation to meet IS requirements. Cost: Included. Timeline: Month 4-6
		Coverage Reports	ability to generate reports displaying information on immunization coverage rates among select			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports for organizations and facilities per CDC Immunization Quality Improvement			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports on immunization coverage for a user-defined geographic area			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports on immunization coverage for a patient cohort			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to view and modify list of patients to be included in immunization coverage report			O	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports displaying immunization coverage trends over time, over a selected timeframe			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports that display the number of missed opportunities for vaccination			E	Yes	Blueprint provides comprehensive reporting and data access capabilities.
Updated		Coverage Reports	ability to generate reports displaying the number of patients late to-date for immunization who are			E	Yes	Blueprint provides comprehensive reporting and data access capabilities.
		Coverage Reports	ability to generate reports that display the number of invalid vaccine doses			E	Yes	Blueprint provides comprehensive reporting and data access capabilities.
		Coverage Reports	ability to generate reports displaying vaccine exemption rates			E	Yes	Blueprint provides comprehensive reporting and data access capabilities.
		Coverage Reports	ability to generate reports displaying immunization coverage by user-defined parameters			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports displaying immunization coverage by vaccine type			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports displaying immunization coverage by age range			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports displaying immunization coverage by ethnicity			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
		Coverage Reports	ability to generate reports displaying immunization coverage by race			E	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8
Updated		Coverage Reports	ability to generate reports displaying immunization coverage by patient sex			O	Yes with configuration	Coverage assessment reporting will be configured to calculate rates by vaccine, age, geography, and demographics. Cost: Included. Timeline: Month 6-8

Status	Req. #	Capability	Requirement: The IIS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with configuration*, No (comment required)	Vendor comment(s)
		Patient Search	ability to search for patient records			E	Yes	Blueloft provides patient search with multi-criteria options including name matching (last/first/initials), DOB, identifiers, and demographics
		Patient Search	ability to search patient record based on one or multiple user defined parameters			E	Yes	Blueloft provides patient search with multi-criteria options including name matching (last/first/initials), DOB, identifiers, and demographics
		Patient Search	ability to re-search for a patient record by modifying existing search parameters			E	Yes	Blueloft provides patient search with multi-criteria options including name matching (last/first/initials), DOB, identifiers, and demographics
		Patient Search	ability to display the list of returned possible patient matches per jurisdictional policy			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to select a patient record from the list of possible patient matches			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to add demographic information to a patient record			E	Yes	Blueloft manages comprehensive demographics including name, DOB, gender, race, ethnicity, address, and identifiers.
		Add, Edit Patient	ability to create a new patient record			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to edit demographic information in a patient record			E	Yes	Blueloft manages comprehensive demographics including name, DOB, gender, race, ethnicity, address, and identifiers.
		Add, Edit Patient	ability to insert permanent comments in a patient's record that can be viewed based on			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to display the user who created the permanent comment in a patient's record			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to prevent a patient record from being saved unless required fields are completed, per			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to automatically notify a user when attempting to submit an incomplete patient record			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store CDC endorsed core data elements for all patient records			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store multiple reported names for each patient to include: first name, middle name,			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store multiple patient addresses			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to support multiple patient address type designations (e.g., primary address, vacation			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to identify effective dates for use of a patient address			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store all historic addresses for a patient			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store country information related to where the patient was born			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, edit patient	ability to flag patient address as verified United States Postal Service address (e.g., via			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, edit patient	ability to record date patient address last verified as a United States Postal Service address (e.g., via			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to automatically create a unique patient ID number			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to automatically associate patient ID number to the patient's record			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to track patients of all ages per jurisdictional law or policy			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store mother's HIV status for a patient			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store a patient's occupation	Particularly relevant		E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to designate patient as belonging to a priority group for vaccination	Particularly relevant		O	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to store multiple patient identifiers			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to assign patient records to a cohort	Particularly relevant		E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to assign patient records to multiple cohorts	Particularly relevant		E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to view patient records by cohort	Particularly relevant		E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to remove patient records from a cohort	Particularly relevant		E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to manage patient status at the organization/facility level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to store active patient status at the organization/facility level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to store inactive patient status at the organization/facility level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to edit active patient status at the organization/facility level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to edit inactive patient status at the organization/facility level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to store reason for inactive status of patients at the organization/facility level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to edit multiple patients status in one action			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to manage patient status at the geographic jurisdictional level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to store active patient status at the geographic jurisdictional level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to store inactive patient status at the geographic jurisdictional level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to edit active patient status at the geographic jurisdictional level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to edit inactive patient status at the geographic jurisdictional level			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to store reason for inactive status of patients at the geographic jurisdictional level			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to restrict access to patient records that have been placed in an Inactive status			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Status	ability to restrict edits to patient records that have been placed in an inactive status			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Consent	ability to manage patient consent per jurisdictional policy			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Consent	ability to update patient consent on a patient's record			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Consent	ability to opt out a patient from participating in the IIS			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Consent	ability to opt in a patient for participation in the IIS			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Consent	ability to enable access to a patient record per consent designation			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Patient Consent	ability to enable updates to a patient record per consent designation			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to add vaccination event information to a patient record			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to edit vaccine information in a patient record			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to mark vaccine information in a patient record for deletion			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to add reason for deletion of vaccine information in a patient record			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to capture vaccine eligibility by vaccine dose for publicly purchased vaccine			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store vaccine eligibility by vaccine dose for publicly purchased vaccine			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to report multiple doses administered to the same patient on the same administration date			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store all CDC endorsed core data elements related to vaccine events			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to enter vaccination substandard or otherwise compromised flag			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to view submitted vaccination event information on a patient's record			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to store adverse reactions in accordance with Vaccine Recommendations and Guidelines of			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to flag an adverse reaction as having been reported to VAERS			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to store patient vaccination event funding eligibility information			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to print form for signature of vaccine refusal by patient for each individual vaccine antigen			O	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to ensure that the default lot number is from the oldest lot when entering an administered			E	Yes	Blueloft provides comprehensive patient management capabilities.
		Add, Edit Patient	ability to record administration of vaccination regardless if vaccine has since expired in inventory			E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Add, Edit Patient	ability to track vaccinations that require adjuvant	Particularly relevant		E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Print/Export Record	ability to securely print a patient's immunization record			E	Yes	Blueloft provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to include evaluated history in the printable version of the patient record			E	Yes	Blueloft provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to include the forecast in the printable version of the patient record			E	Yes	Blueloft provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to include immunity in the printable version of the patient record			E	Yes	Blueloft provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to securely export a patient immunization record			E	Yes	Blueloft provides comprehensive reporting and data access capabilities.
		Print/Export Record	ability to export a patient record in user-defined format			O	Yes	Blueloft supports export in Excel, CSV, PDF, XML, and JSON formats.
		Mass Vaccination	ability to support mass vaccination operations	Necessary for mass		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability to rapidly capture patient demographic information offline during mass vaccination clinic	Necessary for mass		E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Mass Vaccination	ability to rapidly capture vaccine information offline during mass vaccination clinic for later	Necessary for mass		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability to support rapid capture of patient demographic information during mass vaccination	Necessary for mass		E	Yes with configuration	Immunization event recording will be configured to capture all CDC-required fields including vaccine codes, dates, lot, site, route, and VIS. Cost:
		Mass Vaccination	ability to support rapid capture of vaccine information during mass vaccination clinic	Necessary for mass		E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability to administer vaccines during public health emergency without impacting the patient's	Necessary for mass		O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Mass Vaccination	ability for jurisdictional admin to flag/indicate org/facility participation in mass vaccination event	Necessary for mass		O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6

Status	Req. #	Capability	Requirement: The IS must/should have...	Comments	Business notes	Priority: E, O (essential, optional)	Vendor response: Yes, No with customization?, No *	Yes, Yes with customization?, No *
		Vaccine Inventory	ability to search inventory by user-defined parameters			E	Yes with configuration	
		Vaccine Inventory	ability to search the inventory by funding source			E	Yes with configuration	
		Vaccine Inventory	ability to search inventory by vaccine type			E	Yes with configuration	
		Vaccine Inventory	ability to search inventory by vaccine lot number			E	Yes with configuration	
		Vaccine Inventory	ability to search inventory by vaccine NDC code			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to manage vaccine inventory			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to support visualization of current vaccine inventory			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to edit inventory funding source at the lot level			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to edit inventory funding source at the vaccine level			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to add vaccine information to inventory			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to support barcode scanning system to electronically upload vaccine inventory to the IIS		Particularly	O	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to view current inventory list by facility			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to view current inventory list by organization			E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability for jurisdictional admin to edit organization/facility inventory			E	Yes with configuration	
Updated		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 with configuration	
		Add, Edit Vaccine Inventory	ability to reassign funding source of borrowed vaccine from private to public or vice versa for replacement cases			O	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to view storage capability		Particularly	E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to document vaccine storage and handling events such as temperature excursions		Particularly	E	Yes with configuration	
		Add, Edit Vaccine Inventory	ability to store storage capability		Particularly	E	Yes with configuration	
		Vaccine Ordering	ability for rule based logic to recommend vaccine order quantity			E	Yes with configuration	
		Vaccine Ordering	ability to alert user when "reorder recommendation" inventory level is reached			O	Yes with configuration	
Updated		Vaccine Ordering	ability to pre-populate order with recommended quantities based on inventory, doses reported as administered to IIS			E	Yes with configuration	
		Vaccine Ordering	ability to edit pre-populated order quantity			E	Yes with configuration	
		Vaccine Ordering	ability to order vaccines			E	Yes with configuration	
		Vaccine Ordering	ability for jurisdictional admin to activate vaccines available for ordering			E	Yes with configuration	
		Vaccine Ordering	ability for jurisdictional admin to deactivate vaccines available for ordering			E	Yes with configuration	
		Vaccine Ordering	ability to order publicly purchased vaccines			E	Yes with configuration	
		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 with configuration	
		Vaccine Ordering	ability to enter a reason for vaccine orders outside the recommended order quantity			E	Yes with configuration	
		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 with configuration	
		Vaccine Ordering	ability to update contact information during each order without leaving ordering workflow			E	Yes with configuration	
		Vaccine Ordering	ability to save an unsubmitted order			E	Yes with configuration	
		Vaccine Ordering	ability to update organization/facility contact information before submitting a vaccine order			E	Yes with configuration	
		Vaccine Ordering	ability to cancel unsubmitted or unprocessed vaccine orders			E	Yes with configuration	
		Vaccine Ordering	ability to edit unsubmitted or unprocessed vaccine orders			E	Yes with configuration	
		Vaccine Ordering	ability to save an unsubmitted order after rejection			E	Yes with configuration	
		Vaccine Ordering	ability to verify order information before order submitted			E	Yes with configuration	
		Vaccine Ordering	ability for jurisdictional admin to reject a vaccine order			E	Yes with configuration	
		Vaccine Ordering	ability for jurisdictional admin to select a reason code when rejecting an order			E	Yes with configuration	
		Vaccine Ordering	ability to edit an order after rejection			E	Yes with configuration	
		Vaccine Ordering	ability to resubmit an order after rejection			E	Yes with configuration	
		Vaccine Ordering	ability to electronically notify the facility of a rejected order			E	Yes with configuration	
		Vaccine Ordering	ability to track the shipping status of orders			E	Yes with configuration	
		Vaccine Ordering	ability to verify packing slip information after order is shipped			O	Yes with configuration	
		Vaccine Ordering	ability to receive electronic notification when order quantity received does not match vaccine order			O	Yes with configuration	
		Vaccine Ordering	ability to receive electronic notification when vaccine order received is damaged			O	Yes with configuration	
		Vaccine Ordering	ability to request shipping label for nonviable vaccine subject to return			O	Yes with configuration	
		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 timeframe			E	Yes	
		Vaccine Ordering	ability to pre-book vaccine orders		Particularly	E	Yes with configuration	
		Vaccine Ordering	ability for jurisdictional admin to allocate vaccine inventory per user-defined parameters		Particularly	E	Yes with configuration	
		Vaccine Ordering	ability to activate vaccine ordering functionality for all designated organizations/facilities during a public health emergency		Particularly	E	Yes with configuration	
		Vaccine Ordering	ability for jurisdictional admin to create order sets		Particularly	E	Yes with configuration	
		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 with configuration	
		Review/Approve Order	ability for jurisdictional admin to approve order			E	Yes with configuration	
		Review/Approve Order	ability for jurisdictional admin to adjust order			E	Yes with configuration	
		Review/Approve Order	ability for jurisdictional admin to electronically accept VFC vaccine into inventory			E	Yes with configuration	
		Review/Approve Order	ability to accept each vaccine product in the IIS after shipment is received			E	Yes with configuration	
		Vaccine Dose	ability to automatically decrement vaccine doses from inventory when matched vaccine doses are reported as administered			E	Yes with configuration	
		Vaccine Dose	ability to automatically match vaccine doses reported as administered to vaccine doses in inventory to facilitate dose decrementing			E	Yes with configuration	
		Vaccine Dose	ability to automatically decrement vaccine inventory in real-time via HL7 messaging			E	Yes with configuration	
		Vaccine Dose	ability to automatically decrement vaccine inventory in real-time via IIS data entry			E	Yes with configuration	
		Vaccine Inventory	ability to reconcile vaccine doses currently in physical storage with vaccine doses reflected in system inventory			E	Yes with configuration	
		Vaccine Inventory	ability to document reductions in vaccine inventory due to outgoing vaccine transfers			E	Yes with configuration	
		Vaccine Inventory	ability to electronically document reductions in vaccine inventory due to outgoing vaccine wastage			E	Yes with configuration	
		Vaccine Inventory	ability to enter current number of vaccine doses on-hand in physical storage			E	Yes with configuration	
		Vaccine Inventory	ability to track and manage doses for vaccines on-hand, administered, wastage, expired, ordered, recalled, returned, transferred			E	Yes with configuration	
		Vaccine Inventory	ability to enable removal of recalled lots from active inventory			E	Yes with configuration	
		Vaccine Inventory	ability to print a reconciliation worksheet			O	Yes with configuration	
		Vaccine Transfers	ability for jurisdictional admin to approve vaccine transfers			O	Yes with configuration	
		Vaccine Transfers	ability for jurisdictional admin to initiate VFC vaccine transfers			O	Yes with configuration	
		Vaccine Transfers	ability to accept VFC vaccine transfers			O	Yes with configuration	
		Vaccine Transfers	ability for jurisdictional admin to reject vaccine transfers			O	Yes with configuration	
		Vaccine Transfers	ability to search and view past vaccine transfers within a specified timeframe			O	Yes with configuration	
		Vaccine Transfers	ability for jurisdictional admin to allow for direct vaccine transfer between facilities without jurisdictional pre-approval, but with jurisdictional visibility/oversight		Particularly	O	Yes	
		Vaccine Wastage	ability to manage vaccine wastage			E	Yes with configuration	
		Vaccine Wastage	ability to determine the total cost of wasted vaccine by user-defined parameters			E	Yes with configuration	
		Vaccine Wastage	ability for jurisdictional admin to modify inventory quantity to reflect wastage			E	Yes with configuration	
		Vaccine Wastage	ability for jurisdictional admin to assign reason for inventory wastage			E	Yes with configuration	
		Vaccine Wastage	ability to determine the total doses of vaccine wasted by user-defined parameters			E	Yes with configuration	
		Vaccine Expiration	ability to manage vaccine expiration			E	Yes with configuration	
		Vaccine Expiration	ability to alert users to vaccine nearing expiration			O	Yes with configuration	
		Vaccine Expiration	ability to provide alerts for inventory already expired			O	Yes with configuration	
		Vaccine Expiration	ability for jurisdictional admin to modify inventory quantity removed from available inventory			E	Yes with configuration	



Status	Req. #	Capability	Requirement: The IIS must/should have...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization*, No *Comment required
Updated		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 with configuration
		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 with configuration
		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 with configuration
		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 with configuration
		Standard Reports	ability to generate a report that provides/displays information about current inventory			E	Yes with configuration
		Standard Reports	ability to generate a report that provides/displays information about inventory			E	Yes with configuration
		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 Virecs within a			E	Yes with configuration
		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			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	Needed		E	Yes
		Standard Reports	ability to generate report of student exemptions by type (medical, religious)	Needed		E	Yes
		Standard Reports	ability to generate a record of students' immunizations for school purposes	Needed		E	Yes
		Standard Reports	ability to generate exclusion letters stating which vaccine(s) a student needs to come into	Needed		E	Yes
		Standard Reports	ability to generate reports for individuals vaccinated during a mass vaccination event	Needed		E	Yes
		Standard Reports	ability to generate doses administered reports for priority groups during a public health	Needed		E	Yes
		Standard Reports	ability to generate a report that provides information about the status of the system in			E	Yes
		Ad Hoc Queries &	ability to generate queries and reports based on user-defined parameters			E	Yes
		Ad Hoc Queries &	ability to schedule an ad hoc query to run on a predetermined interval (i.e., daily, weekly,			E	Yes
		Ad Hoc Queries &	ability to generate reports with a user-defined report format			E	Yes
		Ad Hoc Queries &	ability to generate reports across geographic hierarchy levels			E	Yes
		Ad Hoc Queries &	ability to generate data to inform the public via website dashboards or similar means	Particu		E	Yes
		Ad Hoc Queries &	ability to store saved report templates			E	Yes
		Ad Hoc Queries &	ability to modify saved report templates			E	Yes
		Ad Hoc Queries &	ability to inactivate (archive) saved report templates			E	Yes
		Ad Hoc Queries &	ability to modify a query			E	Yes
		Ad Hoc Queries &	ability to delete a query			E	Yes
		Ad Hoc Queries &	ability to save an ad hoc query			E	Yes
		Ad Hoc Queries &	ability to create a map using geocodes for statistical reporting			O	Yes
		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	Particu		E	Yes
		Print/Export Reports	ability to export record level de-identified data	Particu		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 with configuration
		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	Particu		E	Yes with configuration
Updated		Consumer Access	ability for authorized consumer to view immunization forecast			E	Yes
Updated		Consumer Access	ability for authorized consumer to view patient information			E	Yes
Updated		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 with configuration
		Consumer Access	ability for patient/patient representative to opt out of reminder/recall notifications			O	Yes with configuration



Non-functional  
Items in red indicate where a jurisdiction should include a measure/threshold that meets their needs

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Status	Req. #	Attribute	Sub Characteristics	Requirements: The IIS must/should...	Comments	Reviewer notes	Priority: E, O (essential, optional)	Vendor response: Yes, Yes with customization, No (comment required)	Vendor comment(s)
		Performance	Time Behavior	support a responsive user interface			E		
		Performance	Time Behavior	support application launch, i.e. time between user initiation and application start, in less than 10 seconds	Recommendation: 10 seconds		E		
		Performance	Time Behavior	support response to a user navigation action (e.g., mouse movement, keypresses, navigation) in less than 1 second	Recommendation: 1 second		E		
		Performance	Time Behavior	support response to process submitted information via direct data entry in less than 4 seconds	Recommendation: 4 seconds		E		
		Performance	Time Behavior	support generation of standard, pre-configured report in less than 30 seconds	Recommendation: 30 seconds		E		
		Performance	Time Behavior	support responsive data analysis system interface			E		
		Performance	Time Behavior	support electronic response to a submitted HL7 message in 5 seconds or less, 95% of the time	Recommendation: 5 seconds or less, 95% of the time		E		
		Performance	Capacity	support up to 1000 concurrent users of the user interface without performance degradation			E		
		Performance	Capacity	support multiple users viewing the same data at the same time			E		
		Performance	Capacity	support users using the same function at the same time without degrading IIS performance			E		
		Performance	Resource	support resource-intensive tasks without degrading IIS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Resource	support user queries via the user interface without degrading IIS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Resource	support generation of ad hoc reports without degrading IIS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Resource	support data extracts without degrading IIS performance			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Performance	Capacity	support efficient processing of HL7 messages without performance degradation, as per jurisdictional capacity			E		
		Performance	Capacity	support processing of up to 200 of HL7 V2U messages per hour without performance degradation			E		
		Performance	Capacity	support processing of up to 8000 of HL7 QBP messages per hour without performance degradation			E		
		Performance	Capacity	support permanent storage of records as per jurisdictional policy			E		
		Performance	Capacity	support storage of unlimited number of organization records			E		
		Performance	Capacity	support storage of unlimited number of user records			E		
		Performance	Capacity	support storage of unlimited number of patient records			E		
		Performance	Capacity	support storage of unlimited number of patient immunization records			E		
		Usability	Accessibility	meet the United States Access Board Section 508 standards			E		
		Usability	Operability	support back arrows for menu navigation, screen management (e.g., collapse, expand) (unimpeded by the system)			E		
		Usability	Operability	ability to execute Boolean search			E		
		Usability	Operability	ability to execute a wildcard search			E		
		Usability	User error	minimize data entry errors			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	assist in entering data correctly via pick lists, drop-down boxes, or other easy-to-use options such as			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	indicate required fields for data entry			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	ability to provide alert when required fields are left blank			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	support cross-field checks to ensure accuracy of information where dependencies exist (e.g., warning that a			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Usability	User error	support spell check functionality with medical terminology for all free text fields			O	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
Updated		Usability	User interface	support differentiation between warning messages (network is recommended prior to entry being continued)			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Usability	User interface	support user feedback with a simple indicator for response times between 2-4 seconds	Recommendation: 2-4 seconds		O		
		Usability	User interface	support user feedback with expected response time and percent-done indicator for response times greater than 4 seconds	Recommendation: 4 seconds		O		
		Usability	User interface	support users stopping an operation expected to take longer than 10 seconds	Recommendation: 10 seconds		O		
		Usability	User interface	support users in performing other tasks while waiting for the system to complete tasks expected to take longer than 30 seconds	Recommendation: 30 seconds		O		
		Reliability	Availability	support availability of the system as per jurisdictional needs			E		
		Reliability	Availability	support access to the web application 99.9% of the time	Recommendation: 99.9%		E		
		Reliability	Availability	support processing of and response to HL7 messages 99.9% of the time	Recommendation: 99.9%		E		
		Reliability	Recoverability	ability to back up the IIS data as per jurisdictional policy			E		
		Reliability	Recoverability	support redundancy of the IIS as per jurisdictional recovery plan			E		
		Reliability	Recoverability	support real-time failover			E		
		Reliability	Recoverability	support the recovery of backed up data as needed			E		
		Reliability	Recoverability	support the restoration of IIS data after an outage or loss			E		
		Reliability	Fault tolerance	support the efficient roll back of software changes as needed			E	Yes with configuration	This capability will be configured during implementation to meet IIS requirements. Cost: Included. Timeline: Month 4-6
		Security	Non-repudiation	support audit logs for security purposes			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability to electronically notify the system administrator of unauthorized activity			E		
		Security	Authenticity	ability to track all attempted access that fail identification, authentication and authorization requirements			E		
		Security	Authenticity	ability to track all accesses that successfully comply with identification, authentication and authorization			E		
		Security	Non-repudiation	ability to maintain audit logs for specified time per jurisdictional policy			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by function performed			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by date and time period			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by date range			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by user defined parameters			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to search audit log by patient identifiers			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to filter audit log search by user defined parameters			O	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	ability for jurisdictional admin to sort audit log search results			O	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	store audit data related to user access/viewing of patient records in the system			E		
		Security	Integrity	store date of user access to a patient record			E		
		Security	Integrity	store time of user access to a patient record			E		
		Security	Integrity	store user ID of user access to a patient record			E		
		Security	Non-repudiation	store audit data related to data changes in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'date received' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'time received' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'date updated' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store 'time updated' for data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Non-repudiation	store user associated with data modified in the system			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	automatically enforce session timeout for a user when idle period is reached			E		
		Security	Integrity	ability for automatic session timeout to be customized per jurisdictional policy			O		
		Security	Integrity	ability to notify the user the session will expire			E		
		Security	Confidentiality	support masking of passwords as they are typed or entered into the user interface			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability for system administrator to terminate user connections			E		
		Security	Confidentiality	safeguard electronic personally identifiable information by implementing the appropriate technical best practices	NIST Special Publications, Federal Information Processing Standards		E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to encrypt personal identifiable information at rest			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to decrypt personal identifiable information at rest			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to encrypt personal identifiable information during transmission			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Confidentiality	ability to decrypt personal identifiable information during transmission			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability to maintain firewall logs for protection of the hosting network			E	Yes	BlueDot meets enterprise-grade non-functional requirements for security, performance, and compliance.
		Security	Integrity	ability to maintain firewalls for protection of the hosting environment			E		
		Security	Integrity	ability to maintain logs of the system admin of unauthorized activity			E		
		Security	Integrity	ability to support anti-virus protection at current critical patch levels in the hosting environment			E		
		Maintainability	Availability	support event logging			E		
		Maintainability	Analysability	ability for system admin to enable event logging on all servers			O		
		Maintainability	Analysability	ability for system admin to enable event logging on all devices			O		
		Maintainability	Analysability	ability for system admin to disable event logging on all devices			O		
		Maintainability	Analysability	ability for system admin to limit access to event logs, including System, Application, Web and Database logs			O		
		Portability	Adaptability	support use of web browsers per jurisdictional policy			E		
		Portability	Adaptability	support use of current version of web browsers			E		
		Portability	Adaptability	support use of last prior version of web browsers			E		
		Portability	Adaptability	support a responsive design that renders properly on multiple devices			E		



## Glossary of Terms

Terms and definitions used within requirements. Note: For definitions of general terms related to immunizations, see the CDC Vaccines and Immunizations Glossary. [Return to Cover Page](#)  
 For definitions of general terms related to IIS, see the AIRA MIROW Common Vocabulary resources.

Term	Definition
Admin	Refers to a jurisdictional admin and organizational admin.
Associate (verb)	Establish a relationship between entities. Synonymous with "link."
At rest	Used to refer to data in storage within the IIS.
Audit log	Also referred to as an audit trail. Used to refer to the tracking of information about system activity and changes, used for security purposes.
Authorization agreement	Formal or legal agreement between an organization submitting and/or using immunization data and the jurisdiction that outlines terms for participating in the IIS per jurisdictional policy (e.g., data use agreements, user agreements).
Authorized consumer	A consumer authorized to access IIS records such as their personal vaccination records or those for individuals for whom they are guardians/care-takers.
Authorized user	Individual authorized to access the system based on their role and affiliation with an IIS-authorized organization.
Automatically	Ability for the system to take action without manual intervention.
Capture	Ability to enter data via user interface (UI) or data exchange interface for immediate usage. Does not necessarily imply storage.
Clinician	A clinician or health care professional who orders and/or administers vaccines (e.g., vaccine ordering provider, vaccine administering provider).
Cohort	A group of patients of particular interest to an organization and/or facility (e.g., a group of health plan members, a group of students, group of individuals with the same age).
Containerization	Containerization packages an application along with all its necessary configuration files, libraries, and dependencies, ensuring it runs efficiently and without bugs across various computing environments.
Delete	Process by which data are removed from the IIS system, including removal from data table(s). Synonymous with "purge."
During transmission	Used to refer to data being transmitted or actively moved from one location to another.
Edit	Global term to reflect ability to modify, update, and change data. For a particular field, this also includes the ability to delete field-level data that is no longer accurate.
Electronic notification	Communication/message sent to a user without manual intervention.
Electronic response	The IIS returns a final resolution, or outcome, of processing the HL7 message with a conformant HL7 (Health Level Seven) message.
Enroll	Process by which an organization or a facility is authorized to participate in an IIS and/or in a jurisdictional Vaccines for Children (VFC) program (i.e., storing) information about system activity and changes, used for IT support and maintenance.
Event log	Tracking (i.e., storing) information about system activity and changes, used for IT support and maintenance.
Facility	A sub-organizational unit for organizations with multiple locations. May also be synonymous for "organization" for organizations with one location.
Immunization Information System	Refers to the application, data and staff that record all immunization doses administered by participating providers to individuals within a jurisdiction.
Inactivate	To make inoperable.
Interface (noun)	Connection between two or more systems for transmission of data.
Interface (verb)	Act of securely exchanging data to facilitate data use.
Interoperate	Data are transmitted from one system to be consumed by another.
Jurisdictional admin	Jurisdictional IIS staff authorized to enter and modify information in the IIS.
Jurisdictional vaccine program admin	Jurisdictional vaccine program staff authorized to enter and modify VFC- and vaccine program-related information in the IIS.
Manage	Global term used to refer to the ability to add, edit, or otherwise modify information.
Notification	A push communication to an authorized user.
Order set	A standardized group of supply items that can be ordered at one time that create efficiencies in the ordering process.
Organization	An entity that may provide data to an IIS and/or may consume IIS data and information (e.g., provider organization, school). An organization staff within the organization (e.g., clinic, facility, LHD) responsible for maintaining the organization/facility information in the IIS, including used to refer to an individual. Synonymous with "client."
Organizational admin	Staff within the organization (e.g., clinic, facility, LHD) responsible for maintaining the organization/facility information in the IIS, including used to refer to an individual. Synonymous with "client."
Patient	Used to refer to an individual. Synonymous with "client."
Personally identifiable information	"Any information about an individual maintained by an agency, including (1) any information that can be used to distinguish or trace an individual against a particular organization, and (2) any information that is linked, directly or indirectly, to an individual, that is maintained by an agency." (25 CFR 162.103)
Process	The IIS reads the incoming data and takes appropriate action based on the data submitted and previously known information already in the IIS.
Provider	A vaccinating or non-vaccinating health care professional authorized to submit, access and/or use IIS data.
Provider organization	A type of organization that has any combination of the following characteristics: provides vaccination services, responsible for an entity that provides vaccination services, responsible for an entity that provides vaccination services.
Query	A question posed of the IIS data.
Recall	A notification sent to individuals who are overdue for a vaccination.
Re-enroll	Process by which a previously enrolled organization or facility is re-authorized to participate in an IIS and/or in a jurisdictional VFC program.
Reminder	A notification sent to individuals who are due to receive a vaccination soon.
Report	System generated data or information available in suitable formats, which may include outputs of queries.
Store	Maintenance of data for potential future use. Note: use of "store" also implies data capture.
System admin	Jurisdictional administrator responsible for oversight of the IIS technology, typically an IT role.
System alert	A communication broadcast to authorized users.
Track	Follow the steps of a process to note a modification.
User	Individual associated with an organization authorized to access the IIS system to submit and/or consume IIS data and information (e.g., user-defined parameter).
User agreement	Agreement between a representative(s) of an organization and the jurisdiction, outlining terms for participation in the IIS, per jurisdictional policy.
User-defined parameter	An element selected by a user to define the scope of a particular process or activity.
Vaccines for Children (VFC)	A type of provider organization, specifically, a provider organization that is enrolled in the VFC program.
Vaccine program	A program managed and administered by a jurisdiction to provide specified vaccine(s) to specified organizations or facilities (e.g., Vaccines for Children).

Draft IIS Functional Standards, v5.0			IIS Functional Model Fur					
Goal	Standard	Guidance Statement	Administer System	Manage Organizations and Facilities	Manage Users	Support Interoperability	Ensure Data Quality	
A. Establish and maintain a secure, confidential Immunization Information System.	1.0 The IIS is physically and digitally secured in accordance with policies and industry standards for protected health information, security, and encryption.				x			
		1.1 The IIS establishes, documents, and updates policies and procedures to manage the collective functions, capabilities, and attributes of an IIS.						
		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.						
			1.3 The IIS provides ongoing training to ensure awareness of and to promote adherence to policies and procedures.			x		
	2.0 The IIS is physically and digitally secured in accordance with industry standards for disaster avoidance, mitigation, and recovery.							
		2.1 The IIS establishes and maintains the infrastructure needed for disaster avoidance.						
		2.2 The IIS establishes and tests recovery plans to mitigate system downtime.						