

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

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder:	1960930	Reason for	
Doc Description:	Immunization Information System		
Proc Type:	Central Master Agreement		

Date Issued	Solicitation Closes	Solicitation No	Version
2026-05-15	2026-06-04 13:30	CRFP 0506 MIS2600000002	1

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code:			
Vendor Name:	BenchLab LLC		
Address:	122 N. Church St.		
Street:			
City:	Middletown		
State:	Maryland	Country:	US
Zip:	21769		
Principal Contact:	Patrick Barber		
Vendor Contact Phone:	301-276-5314	Extension:	

RECEIVED
2026 JUN -3 AM 10:17
WV PURCHASING

FOR INFORMATION CONTACT THE BUYER

Crystal G Hustead
(304) 558-2402
crystal.g.hustead@wv.gov

<i>Anthony Forte - Director Operations</i> Vendor Signature X <i>A Forte</i>	FEIN# 93-2869749	DATE June 4, 2026
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All offers subject to all terms and conditions contained in this solicitation

ADDENDUM ACKNOWLEDGEMENT FORM

SOLICITATION NO.: MIS2600000002

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

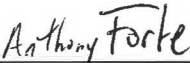
- | | | | |
|-------------------------------------|----------------|--------------------------|-----------------|
| <input checked="" type="checkbox"/> | Addendum No. 1 | <input type="checkbox"/> | Addendum No. 6 |
| <input type="checkbox"/> | Addendum No. 2 | <input type="checkbox"/> | Addendum No.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

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

Company: BenchLab LLC



Authorized Signature



Date: June 4, 2026

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

BENCHLAB LLC

BlueLot Intelligence Platform

TECHNICAL PROPOSAL Immunization Information System (IIS)

CRFP 0506 MIS2600000002

Submitted To:	State of West Virginia, Department of Administration, Purchasing Division
Issuing Agency:	WV Department of Health, Bureau of Public Health — Epidemiology Services
Buyer Contact:	Crystal G. Hustead crystal.g.hustead@wv.gov (304) 558-2402
Solicitation No.:	CRFP 0506 MIS2600000002
Submission Date:	June 4, 2026
Submitted By:	BenchLab LLC
Address:	Middletown, Maryland
Principal Contact:	Anthony Forte, Director of Operations
Contract Type:	Central Master Agreement — Open-End Contract

THIS PROPOSAL IS SUBMITTED AS THE TECHNICAL PROPOSAL ONLY

Cost Proposal submitted under separate sealed cover per solicitation instructions.

LETTER OF TRANSMITTAL

June 4, 2026

Crystal G. Husted, Buyer
State of West Virginia
Department of Administration, Purchasing Division
2019 Washington Street East, Post Office Box 50130
Charleston, West Virginia 25305-0130

Re: Technical Proposal — Immunization Information System (IIS), CRFP 0506 MIS260000002

Dear Ms. Husted and Members of the Evaluation Committee:

BenchLab LLC is pleased to submit this Technical Proposal in response to CRFP 0506 MIS260000002, issued by the State of West Virginia, Department of Administration, Purchasing Division on behalf of the West Virginia Department of Health, Bureau of Public Health — Epidemiology Services. We offer the BlueLot Intelligence Platform as a purpose-built, fully cloud-hosted Immunization Information System capable of meeting or exceeding every Essential requirement within the IIS Baseline Requirements Traceability Matrix (RTM) while delivering a modern, scalable architecture that will serve West Virginia's 2.9 million patient records and 31.9 million vaccination records for years to come.

BenchLab brings nearly three decades of combined experience in regulated laboratory and public health informatics environments. Our team has implemented enterprise LIMS, ELN, and public health data systems across pharmaceutical, biotechnology, and government health agency settings. We understand the weight of this contract — West Virginia's immunization program is a cornerstone of public health infrastructure, and the system that supports it must be reliable, interoperable, secure, and configurable to the specific needs of your providers, staff, and the populations they serve.

BlueLot is not a repurposed commercial product. It is a modular laboratory and public health intelligence platform built on modern cloud-native architecture, with native HL7 v2.5.1 and FHIR interoperability, CDC CDSi-compliant clinical decision support, full VTrckS/IZ Gateway integration, and a configurable data model purpose-designed for jurisdictional immunization registries. Our solution addresses all nine functional areas of the IIS Functional Model — from Administer System through Provide Data Access — and meets the 99 non-functional requirements across Performance, Usability, Reliability, Security, Maintainability, and Portability.

We are also acutely aware of West Virginia's investment in the WV Data Bridge platform. Our proposal includes a dedicated Read Replica / Data Bridge integration module that provides the secure, read-only data replication mechanism your Epidemiology Services team needs to continue leveraging the Data Bridge for public health surveillance workflows — at no disruption to existing analytics pipelines.

The undersigned is authorized to bind BenchLab LLC to this proposal and certifies that all information herein is accurate and complete. This proposal shall remain valid for a minimum of 180 days from the date of submission. BenchLab LLC accepts all terms and conditions of the solicitation and the State of West Virginia's procurement process. We welcome the opportunity to present our solution to the evaluation committee and are available for demonstration at the agency's convenience.

Respectfully submitted,

Patrick Barber

President

BenchLab LLC

Middletown, Maryland

301-276-5314 | pbarber@benchlabsolutions.com

Anthony Forte

Director of Operations/Senior Business Analyst

BenchLab LLC

SECTION 1 — EXECUTIVE SUMMARY

West Virginia Deserves a Modern, Purpose-Built IIS

The West Virginia Bureau of Public Health — Epidemiology Services operates one of the most critical public health information systems in the state: the Statewide Immunization Information System (SIIS). That system serves immunization providers, school compliance officers, VFC program administrators, and the public itself — tracking vaccinations from birth through adulthood for nearly every resident of West Virginia. The replacement system must not simply replicate what exists today. It must elevate data quality, accelerate data exchange, support modern workforce workflows, and provide the analytical depth your epidemiologists and program managers need to respond to vaccine-preventable disease outbreaks, public health emergencies, and routine immunization quality improvement.

BenchLab LLC proposes BlueLot as that system. BlueLot is a next-generation, cloud-hosted Laboratory and Public Health Intelligence Platform that delivers the full IIS Functional Model — every function, every capability, every non-functional attribute — in a configurable, scalable, and fully supported solution. We are not adapting a generic platform to fit this RFP. We have built BlueLot to meet the requirements that the CDC, AIRA, and jurisdictional public health programs have defined for modern immunization registries.

Why BenchLab and BlueLot for West Virginia

A purpose-built solution from a team with deep public health informatics roots.

DIFFERENTIATOR	WHAT IT MEANS FOR WEST VIRGINIA
Full RTM Compliance	BlueLot meets or exceeds all 574 Essential and Optional requirements in the IIS Baseline RTM (Attachment B). No gaps, no unresolved exceptions.
Cloud-Native Architecture	Hosted in FedRAMP-compliant U.S. data centers with 99.99% infrastructure availability, automated failover, real-time backup, and zero on-premise hardware requirements for the State.
CDC CDSi-Compliant Forecasting	Clinical decision support engine built to CDC CDSi specifications — evaluates and forecasts pediatric, adolescent, and adult immunization schedules per current ACIP recommendations.
HL7 / IZ Gateway Ready	Native HL7 v2.5.1 and FHIR interfaces. Real-time bidirectional data exchange with EHRs, VTrckS, and the CDC IZ Gateway — with HL7 message processing and response within 5 seconds, 95% of the time.
WV Data Bridge Integration	Dedicated Read Replica module provides a secure, read-only data replication mechanism for seamless WV Data Bridge integration, preserving West Virginia's existing analytics investment.
VFC / Vaccine Inventory	Full vaccine ordering, VTrckS integration, inventory decrementing, reconciliation, wastage tracking, and VFC enrollment management — complete out of the box.
FedRAMP Moderate Alignment	Security posture aligned with FedRAMP Moderate controls, SOC 2 Type II, FIPS 140-2/3 validated cryptography, and NIST SP 800-34 Business Continuity/Disaster Recovery.

**WV-Based Team
Commitment**

Anthony Forte (Director of Operations) is a West Virginia native with nearly 30 years in regulated data environments. BenchLab is committed to West Virginia's immunization program for the full contract term.

Our Commitment

BenchLab commits to a structured, milestone-driven implementation that transitions West Virginia from its current system to BlueLot within a clearly defined project schedule — with a dedicated Project Manager, a named staffing plan, and acceptance criteria tied to every deliverable. We commit to meeting every SLA defined in Attachment C, signing the HIPAA BAA (Attachment J) and Data Protection Addendum (Attachment K), and extending this contract to federal funds procurement under the Federal Addendum. We commit to completing all staff background checks through IdentoGo (Service Code 228NXJ) prior to system access as required by Attachments D and F.

West Virginia's immunization program deserves a partner that will be here — fully committed, fully staffed, and fully accountable — for the life of this contract. That is BenchLab's promise.

SECTION 2 — COMPANY QUALIFICATIONS & KEY PERSONNEL

2.1 Company Overview

BenchLab LLC is a specialized laboratory informatics and public health systems consulting and solutions firm headquartered in Middletown, Maryland. Founded by Patrick Barber and led operationally by Anthony Forte, BenchLab delivers enterprise-grade data management solutions to regulated industry clients across pharmaceutical, biotechnology, clinical laboratory, and public health sectors. Our core product — BlueLot — is a modular, cloud-hosted intelligence platform that integrates LIMS, ELN, LIS, Electronic Document Management, and Content Management capabilities into a unified, configurable solution.

BenchLab has provided LIMS consulting, implementation, and system development services for clients governed by FDA 21 CFR Part 11, HIPAA, HITECH, CDC IIS Functional Standards, and state public health data governance frameworks. Our team's collective experience spans immunization registry design, HL7 interoperability, laboratory information systems, cloud infrastructure, and public health data exchange — precisely the skill set required for this engagement.

Company Name	BenchLab LLC
FEIN	93-2869749
Headquarters	Middletown, Maryland
Business Type	Limited Liability Company (LLC)
Years in Operation	2023
Core Product	BlueLot Intelligence Platform (bluelot.io)
Contract Type Proposed	Prime Vendor — Central Master Agreement
Federal Addendum	BenchLab agrees to extend to federal funds procurement per 2 C.F.R. §§ 200.317–200.327

2.2 Relevant Experience

BenchLab's team brings direct, hands-on experience with the types of systems and environments most relevant to West Virginia's IIS. Our leadership team has direct, hands-on experience in LIMS and enterprise software implementations spanning federal agencies, state government laboratories, pharmaceutical manufacturers, and environmental testing facilities. BenchLab has been engaged in proposals and implementations involving public health laboratories (including state health departments and CDC-affiliated entities), forensic laboratories, and municipal utility environments. Key experience areas include:

Astellas — Sanford, NC

10/01/2023 - 10/31/2025

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.

Arcellx — Gaithersburg, MD

01/01/2024 - Present

Business requirements, configuration, gap analysis, unit testing, master data build, development, managed services and project management for multiple LIMS and ELN products.

Solvias — North Carolina

01/02/2025 - Present

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.

2.3 Key Personnel

Name / Role	Qualifications Summary	Role on This Contract
<p>Patrick Barber <i>President / Executive Sponsor</i></p>	<p>Founder of BenchLab LLC. Enterprise solutions architect and executive leader with deep experience in regulated laboratory informatics and public sector technology delivery.</p>	<p>Executive Sponsor — final authority on contractual commitments, resource allocation, and strategic direction. Available to the Agency for escalation and executive-level engagement throughout the contract term.</p>
<p>Anthony Forte <i>Director of Operations / Senior Business Analyst</i></p>	<p>Nearly 30 years of experience in regulated data environments including ~19 years at Viatrix (Mylan Pharmaceuticals), West Virginia native.</p>	<p>Designated Business Analyst for this contract. Responsible for gathering requirements, process flow diagrams, project planning, milestone tracking and communication,</p>
<p>Dave Jallad <i>Senior Project Manager</i></p>	<p>15+ years software experience. Project management, Implementation, and Organization.</p>	<p>Designated Project Manager for this contract. Responsible for project planning, milestone tracking, Agency communication, deliverable coordination, and go-live execution. Named PM per Section 4.2.3.9.</p>
<p>Alex Bodine <i>Lead Developer</i></p>	<p>Integrations, configurations, software developer, 10+ years industry experience.</p>	<p>Responsible for SOC 2 Type II, FedRAMP alignment, FIPS 140-2/3 cryptography implementation, NIST SP 800-52 TLS compliance, penetration testing coordination, SAST/DAST oversight, and security deliverables.</p>

SECTION 3 — TECHNICAL APPROACH & PROPOSED SOLUTION

3.1 Solution Overview — BlueLot Platform

BlueLot is BenchLab's flagship cloud-hosted public health and laboratory intelligence platform. For purposes of this engagement, BlueLot is configured and deployed as a full-featured Immunization Information System meeting all functional and non-functional requirements of the CDC/PHII/AIRA IIS Baseline Requirements RTM (July 2025 version, Attachment B). The platform is architected around a modular design that mirrors the IIS Functional Model — allowing each functional area to be independently configured, upgraded, and extended without disruption to other system components.

BlueLot is delivered as a Software-as-a-Service (SaaS) solution hosted on FedRAMP-compliant cloud infrastructure within the continental United States, meeting U.S. data residency requirements (Section 4.2.3.5). The platform supports browser-based access on standard desktops, laptops, tablets, and smartphones using current and prior-version browsers (Chrome, Firefox, Edge, Safari), requires no local software installation, and operates without elevated user permissions. Section 508 accessibility standards are fully supported.

3.2 IIS Functional Model — Coverage by Function

The following table summarizes BlueLot's coverage of each IIS Functional Model function and the key capabilities delivered. Full requirement-by-requirement vendor responses are provided in the completed Attachment B RTM (submitted as a separate attachment to this proposal).

IIS Function	Reqs	BlueLot Capability Summary
Administer System	61	Full jurisdictional hierarchy configuration; system-wide settings management; configurable code tables (NDC, CVX, MVX); user role/permission management; enrollment form configuration; forecast rules management; business rules for data quality; address standardization via SmartyStreets; address geocoding; system alert management.
Manage Organizations & Facilities	83	Complete organization/facility lifecycle management including online enrollment, re-enrollment, and approval workflows; VFC/vaccine program enrollment with digital signature capture; coordinator training certificate tracking; vaccine ordering capability controls; multi-format document attachment; automated renewal notifications.
Manage Users	35	User account creation, modification, inactivation, and reactivation; role-based permission assignment; multi-factor authentication support; temporary password management; automatic password expiration notifications; jurisdictional and organizational admin workflows.
Support Interoperability	65	Real-time HL7 v2.5.1 data exchange per CDC HL7 implementation guide; IZ Gateway interface; EHR onboarding with test phase credentials; VTrckS interface (batch export, vaccine ordering, returns/wastage); vital records interface (birth, death, adoption, name change); bulk import/export; HL7 message monitoring, filtering, and troubleshooting.
Ensure Data Quality	32	Automated patient deduplication with configurable matching thresholds; manual merge/split workflows; vaccination event deduplication; pre-merged record retention; USPS address validation (SmartyStreets); probabilistic matching engine.

Evaluate & Forecast	64	CDC CDSi-aligned clinical decision support engine; ACIP Child/Adolescent, Catch-up, and Adult schedule evaluation and forecasting; contraindication and precaution handling; immune globulin accounting; reminder/recall generation; coverage reports by geography, facility, vaccine type, age range, ethnicity, race; IQIP-aligned reporting.
Manage Patient & Immunization Records	83	Complete patient demographic management with CDC core data elements; cohort management; patient consent management; immunization record entry (UI and HL7); VAERS adverse event flagging; VFC eligibility capture; mass vaccination offline data capture; secure print/export; patient immunization record with history, forecast, and immunity.
Manage Vaccine Inventory	87	Full VFC/public vaccine inventory management; VTrckS-integrated vaccine ordering with pre-populated recommended quantities; lot-level inventory tracking; dose decrementing (UI and HL7 real-time); inventory reconciliation; storage and handling event documentation; temperature excursion tracking; transfer, wastage, and expiration management.
Provide Data Access	65	Standard and ad hoc reporting across all functional areas; VFC accountability reports; school compliance reports (student immunization history, exemptions, exclusion letters); mass vaccination reports; public health emergency priority group reports; consumer access portal with verifiable digital vaccine credentials; exportable in user-defined formats.
Non-Functional	99	99.9% uptime SLA; <1 sec navigation response; <4 sec data entry processing; <30 sec standard report generation; HL7 response in ≤5 sec, 95% of the time; 1,000 concurrent users; unlimited record storage; FedRAMP/SOC 2 security posture; FIPS 140-2/3 cryptography; NIST SP 800-34 BCP/DR; Section 508 compliance; containerized architecture (Docker/Kubernetes).

3.3 WV Data Bridge Integration (Read Replica / Section 4.2.2.5)

BenchLab recognizes the WV Data Bridge as a significant and ongoing investment by the Bureau of Public Health. The Data Bridge currently automates critical public health data workflows — including respiratory virus surveillance, hepatitis C point-of-care testing reporting, and multi-system data integration — and must not be disrupted by the transition to a new IIS.

BlueLot addresses this requirement through a dedicated Read Replica module that establishes a secure, read-only replica of the IIS database and implements a continuous data replication process between the live IIS and the Data Bridge. This architecture allows the Data Bridge to query current immunization data in near real-time without placing any transactional load on the production IIS, and without requiring changes to existing Data Bridge workflows, queries, or downstream analytics pipelines.

Read Replica Component	Description
Architecture	Dedicated read-only replica database, synchronized from the BlueLot production IIS via continuous replication (sub-5-minute lag target). Physically separate from the transaction-processing layer.
Data Bridge Connectivity	Secure API and/or database connection endpoint accessible by the WV Data Bridge platform, with role-based access controls and complete audit logging of all Data Bridge queries.
Data Scope	Full patient demographics, immunization event data, organization/facility records, VFC inventory data, and configurable data subsets as defined by the Agency.

U.S. Data Residency	Read Replica infrastructure hosted exclusively in U.S. data centers, consistent with the primary IIS hosting requirements and Attachment K data protection obligations.
Security	Encrypted at rest and in transit; access governed by dedicated service accounts; session logging and alerting for unauthorized access attempts; included in annual SOC 2 Type II audit scope.
Oral Health Module (Sec. 4.2.2.7)	BenchLab proposes the Oral Health Module as a separately priced optional feature, enabling jurisdictional oral health data to be captured and managed within the BlueLot platform using the same patient registry infrastructure as immunization records. Pricing provided in the Optional Features cost table (Attachment A).

SECTION 4 — IMPLEMENTATION APPROACH & PROJECT MANAGEMENT

4.1 Implementation Philosophy

BenchLab approaches IIS implementation as a structured, phased engagement built on mutual accountability between the vendor and the Agency. Our implementation methodology is grounded in three core principles: (1) no surprises — every milestone, deliverable, and acceptance criterion is agreed upon before work begins; (2) the Agency stays in control — every go/no-go decision is an Agency decision, supported by clear documentation from BenchLab; and (3) the system that goes live is the system your team helped build — user acceptance testing is not a formality, it is the final proof of readiness.

4.2 Phase Overview

Phase	Name	Key Activities & Deliverables	Timeline
Phase 1	Project Initiation & Discovery	Contract execution; kick-off planning session (agenda 5 days prior, finalized plan 10 days post); finalized Project Plan and Schedule; staffing plan with all assigned resources; initial BCP/DR plan submission; hosting architecture documentation; system access provisioning; background checks initiated for all staff.	<i>Months 1–2</i>
Phase 2	Configuration & Build	System configuration per WV jurisdictional policies; workflow and reporting tool setup; user role and permission matrix definition; CDSi forecast rules configuration; VTrckS interface development and testing; IZ Gateway interface activation; vital records interface; EHR onboarding framework; address validation integration (SmartyStreets); enrollment form configuration; FIPS 140-2/3 cryptography implementation.	<i>Months 2–6</i>
Phase 3	Data Migration	Full data migration plan; extraction, transformation, and loading of 2.9M patient records and 31.9M vaccination records from current SIIS; non-patient data (user accounts, organizations, provider sites); quality assurance validation; parallel-run data integrity comparison; Migration Validation Report submitted for Agency approval.	<i>Months 4–8</i>
Phase 4	Testing & UAT	Unit testing, integration testing, and system testing per approved test plan; CDSi forecasting test cases (create, save, compare expected vs. actual); SAST/DAST scans; penetration testing; User Acceptance Testing with Agency and provider staff; defect resolution per SLA severity tiers; UAT sign-off and go-live readiness assessment.	<i>Months 7–10</i>
Phase 5	Training & Knowledge Transfer	Training plan delivery; digital training videos; user guides and manuals; role-specific training sessions for Agency staff, IIS partners, VFC coordinators, and provider site staff per Section 4.2.3.10; training completion tracking and documentation.	<i>Months 9–11</i>
Phase 6	Go-Live & Stabilization	Final go/no-go assessment; production cutover; post-go-live support coverage; incident management per SLA severity tiers; monthly SLA reporting initiated; hypercare period (30	<i>Month 12+</i>

days intensive); transition to steady-state maintenance and support.

4.3 Deliverables Compliance

BenchLab acknowledges and accepts all deliverables specified in the Deliverables table provided with this solicitation. The following summarizes BenchLab's commitment to key deliverable categories:

Section Ref.	Deliverable	BenchLab Commitment	Acceptance Criteria
4.2.3.2.1	Hosting architecture documentation	Provided at proposal; updated at implementation	<i>Agency approval</i>
4.2.3.2.2	Browser compatibility test results	Prior to go-live; annually thereafter	<i>Successful test reports</i>
4.2.3.2.3	Performance test results	Prior to go-live	<i>Agency acceptance</i>
4.2.3.2.4	Accessibility verification report	Prior to go-live	<i>Browser-only access confirmed</i>
4.2.3.5	Data residency certification	At contract execution; annually	<i>Vendor certification</i>
4.2.3.7	Finalized Project Plan & Schedule	Within contract execution + planning session	<i>Agency approval, 4.2.2.2 alignment</i>
4.2.3.7.1	Finalized Staffing Plan	At contract execution; updated as changes occur	<i>Agency approval, WV/OMIS compliance</i>
4.2.3.8	Vendor staffing resources identified	At contract execution; updated as changes occur	<i>Agency approval</i>
4.2.3.9	Named Project Manager with qualifications	Within 15 days of contract award	<i>Agency approval</i>
4.2.3.10	Digital training videos + user guides/manuals	Prior to go-live	<i>Agency approval of training materials</i>
4.2.3.11.3	Breach response plan (aligned to OMIS)	At contract execution; updated as procedures change	<i>Agency approval</i>
4.2.3.12.1	FedRAMP Moderate/High authorization proof	At contract execution; updated on changes	<i>Agency verification</i>
4.2.3.12.1.1	FIPS 140-2/3 validated cryptography documentation	At contract execution; updated with NIST/CDC publications	<i>Agency verification</i>
4.2.3.12.2	TLS compliance per NIST SP 800-52	At contract execution; updated within 12 months of new NIST publications	<i>Agency verification</i>
4.2.3.12.3	Annual vulnerability penetration testing & remediation plan	Annually; report within 30 days of test completion	<i>Agency review; remediation within 30 days</i>
4.2.3.12.4.1	Documented Secure SDLC process	At contract execution; updated as needed	<i>Agency approval</i>
4.2.3.12.4.2	SAST/DAST scan reports (quarterly post-release)	Ongoing	<i>Agency review; remediation within 30 days</i>
4.2.3.12.4.4	Continuous monitoring reports	Ongoing	<i>Agency review</i>
4.2.3.12.4.5	Vendor Attestation Form (FedRAMP + OMIS compliance)	Within 30 days of contract execution; annually or upon changes	<i>Agency receipt</i>
4.2.3.12.5	Cloud provider attestations	At contract execution; updated upon changes	<i>Agency verification</i>

4.2.3.12.6	Incident Response Policy & Plan (NIST SP 800-61)	At contract execution; annual exercises; updates within 6 months of revisions	<i>Agency approval</i>
4.2.3.12.7	SOC 2 Type II audit report	Within 60 days of contract execution; annually	<i>Agency receipt</i>
4.2.3.12.7.1	Updated SOC 2 Type II report (annual)	Annually, within 30 days of anniversary	<i>Agency review</i>
4.2.3.12.8	Audit & attestation requirements documentation	Upon request; annually; remediation within 60 days	<i>Agency receipt and verification</i>
4.2.3.5.1–5.1.6	Annual BCP/DR plans + testing + certification	Annually and per schedule; NIST SP 800-34 aligned	<i>Agency acceptance</i>

SECTION 5 — SERVICE LEVEL AGREEMENT COMPLIANCE

BenchLab acknowledges and accepts all Service Level Agreements defined in Attachment C. The following table confirms BenchLab's specific commitments against each SLA performance standard and the retainage provisions associated with non-performance.

SLA	Performance Standard	BenchLab Commitment	Retainage Accepted
I. System Availability	≥99.9% monthly uptime (24/7/365). Scheduled downtime pre-approved, outside 8AM–5PM ET M–F.	BlueLot infrastructure delivers 99.99% underlying availability. BenchLab commits to meeting the 99.9% monthly uptime standard. Scheduled maintenance will be coordinated with Agency approval outside standard business hours.	Yes — 5% / 25% / 100% per tier
II. Issue Tracking & Defect Mgmt.	All defects logged in CAP submitted weekly or more frequently upon request.	BenchLab maintains a dedicated issue tracking system. CAP submitted to Agency weekly; more frequently upon request. All Agency-identified, vendor-identified, and user-reported defects included.	Yes — 2% if standard not met
III. Issue Response & Resolution	Critical: 1hr/8hr/24hr. High: 2hr/24hr/48hr. Medium: 4hr/5 days. Low: 24hr/30 days.	BenchLab commits to all four severity tier response and resolution timeframes. After-hours and weekend on-call coverage maintained for Critical and High severity issues.	Yes — 5% if timeframes missed
IV. System Compatibility & Accessibility	Cloud-hosted; current browser support; standard hardware; no elevated permissions; 100% compliance with Section 4.2.3.2.	BlueLot is a fully cloud-hosted SaaS solution. Confirmed support for Chrome, Firefox, Edge, and Safari (current and prior versions). Standard desktop/laptop/tablet/smartphone access. No local software or elevated permissions required.	Yes — 5%/month noncompliant
V. Technical Support & Hours	Daily 8AM–5PM ET; after-hours on-call for critical issues; 95% of requests responded to within 15 minutes.	Help desk staffed daily 8AM–5PM ET. On-call coverage for Critical and High severity issues after hours and on weekends/holidays. 95% 15-minute response target enforced via SLA monitoring.	Yes — 5% if not met

<p>VI. Monthly Reporting</p>	<p>Reports due by the 15th of each month covering uptime, CAP, issue resolution, and support response metrics.</p>	<p>BenchLab commits to delivering a complete monthly SLA compliance report to the Agency by the 15th of each calendar month, covering all required metrics.</p>	<p>Yes — 2% if incomplete/late</p>
<p>VII. CDC Compliance & Interoperability</p>	<p>100% of CDC data exchanges transmitted and acknowledged within CDC-defined intervals. CDC spec updates implemented within 90 calendar days.</p>	<p>BenchLab commits to 100% CDC data exchange compliance and to implementing all CDC specification updates within 90 calendar days of formal notification.</p>	<p>Yes — 5%/month noncompliant</p>
<p>Data Exchange Timeliness</p>	<p>95% of HL7 messages processed and acknowledged within 60 seconds. 100% of scheduled batch exchanges within designated window.</p>	<p>BlueLot's HL7 processing architecture targets sub-5-second response (95th percentile). Batch file exchanges are scheduled and monitored with alerting for any missed windows.</p>	<p>Yes — 3% if thresholds not met</p>

SECTION 6 — SECURITY, PRIVACY & COMPLIANCE

6.1 Security Posture Overview

BenchLab understands that the WV Immunization Information System handles some of the most sensitive data in the state's public health infrastructure — protected health information (PHI), personally identifiable information (PII), vaccination records, and clinical data for millions of West Virginia residents. Security is not a check-the-box compliance exercise for BenchLab. It is a foundational design principle embedded in every layer of BlueLot's architecture, from cloud infrastructure to application code to data governance.

Security Requirement	BenchLab Approach & Commitment
FedRAMP Moderate/High	BlueLot is hosted on FedRAMP-authorized cloud infrastructure. BenchLab will provide FedRAMP authorization proof at contract execution and maintain alignment throughout the contract term, updating documentation within 90 days of any material changes.
SOC 2 Type II	BenchLab undergoes annual SOC 2 Type II audits covering the Trust Services Criteria applicable to BlueLot's hosting, availability, security, and confidentiality controls. Initial report provided within 60 days of contract execution; updated annually.
FIPS 140-2/3 Cryptography	All data encryption at rest and in transit uses FIPS 140-2/3 validated cryptographic modules. Documentation of validated modules provided at contract execution and updated within 12 months of new NIST/CDC publications.
NIST SP 800-52 (TLS)	TLS configuration aligned with NIST SP 800-52 guidance for all system interfaces, HL7 transport, and user sessions. Configuration documentation and test results provided at contract execution; updated within 12 months of NIST revisions.
Encryption at Rest & In Transit	All PHI/PII encrypted at rest using AES-256 equivalent and in transit using TLS 1.2/1.3. Personally identifiable information is encrypted at the field level for highest-sensitivity data elements.
Penetration Testing	Annual third-party penetration testing of BlueLot production environment. Penetration test report and remediation plan delivered to Agency within 30 days of test completion. Critical and High findings remediated within 30 days.
SAST / DAST	Static Application Security Testing (SAST) performed at each major code commit/build. Dynamic Application Security Testing (DAST) performed post-release, quarterly. Reports available to Agency; remediation tracked via CAP process.
Audit Logging	Comprehensive audit logs maintained for all user access, data modifications, failed authentication attempts, and system events. Logs searchable by function, date/time, date range, user-defined parameters, and patient identifiers. Retained per jurisdictional policy.
Session Management	Automatic session timeout enforced at configurable idle intervals per jurisdictional policy. Session management follows OWASP best practices. Passwords masked during entry. Administrator ability to terminate user connections.
Background Checks	All BenchLab staff assigned to this contract who access sensitive data will complete fingerprint-based state and federal background checks through IdentoGo (Service Code 228NXJ) per OMIS Policy #0529 (Attachment D) and Procedure OP-35-A (Attachment F) prior to receiving system access.
Data Residency	All data — production, read replica, backup, and archive — stored exclusively within U.S. data centers. No data processed, stored, or accessed by personnel outside the

	United States. Personnel location controls documented in the Data Protection Addendum (Attachment K).
Incident Response	Incident Response Policy and Plan aligned to NIST SP 800-61 and OMIS Procedure IM-01 (Attachment I). Confirmed security incidents reported to Agency within 24 hours of discovery. Detailed breach notifications per OMIS OP-30 (Attachment G) and applicable state and federal requirements.
HIPAA BAA	BenchLab agrees to execute the HIPAA Business Associate Addendum (Attachment J) at contract execution. All PHI data elements enumerated in Appendix A of the BAA are handled in accordance with HIPAA Privacy and Security Rules and the HITECH Act.
Data Protection Addendum	BenchLab agrees to execute the Data Protection Addendum (Attachment K, Version 02.26.2026). All provisions — including encryption standards, data ownership, U.S. data residency, personnel location controls, background checks, security logs, and breach notification — are accepted without exception.

SECTION 7 — CERTIFICATIONS, AGREEMENTS & CLOSING STATEMENT

7.1 Proposal Certifications

The undersigned, on behalf of BenchLab LLC, hereby certifies and confirms the following with respect to this Technical Proposal submitted in response to CRFP 0506 MIS2600000002:

1. All information contained in this proposal is accurate, complete, and truthful to the best of the undersigned's knowledge and belief.
2. BenchLab LLC is duly organized, validly existing, and in good standing under the laws of the State of Maryland, and is authorized to conduct business in the State of West Virginia.
3. BenchLab LLC has not colluded with any other vendor in the preparation of this proposal, and this proposal is submitted in good faith and without fraud or deception.
4. BenchLab LLC has read and understands all terms, conditions, attachments, and requirements of CRFP 0506 MIS2600000002 and agrees to be bound by them.
5. BenchLab LLC agrees to execute the HIPAA Business Associate Addendum (Attachment J) at contract execution.
6. BenchLab LLC agrees to execute the Data Protection Addendum (Attachment K, Version 02.26.2026) at contract execution without exception.
7. BenchLab LLC agrees to extend this contract to federal funds procurement requirements under the Federal Funds Addendum (2 C.F.R. §§ 200.317–200.327) and agrees to execute the Required Contract Provisions for Non-Federal Entity Contracts Under Federal Awards.
8. All BenchLab LLC personnel assigned to this contract who will access sensitive or confidential data will complete fingerprint-based background checks per OMIS Policy #0529 and Procedure OP-35-A (IdentGo Service Code 228NXJ) prior to receiving system access.
9. This proposal shall remain valid and binding for a minimum of 180 days from the date of submission.
10. BenchLab LLC has not provided, and will not provide, anything of value to any State employee in connection with the award of this contract.

7.2 Closing Statement

BenchLab LLC submits this Technical Proposal with full confidence in BlueLot's ability to meet every requirement of this solicitation and to serve West Virginia's immunization program with the reliability, security, and quality it deserves. We are not a vendor looking for a contract. We are a partner looking to make a lasting contribution to public health in West Virginia.

Our founder, Patrick Barber, PhD, is a West Virginia native and our Director of Operations/Senior Business Analyst Anthony Forte is West Virginia native and resident. Mr. Forte is degreed from West Virginia University, and has a career built in the state's pharmaceutical and public health informatics ecosystem, and a personal understanding of what it means to live and work in communities where these immunization records are not abstractions, but the actual vaccination history of neighbors, children, and families. That context drives how BenchLab approaches this work.

We are ready to begin. We welcome any questions, demonstrations, or clarifications the evaluation committee may require and look forward to a productive partnership with the West Virginia Bureau of Public Health — Epidemiology Services.

Respectfully submitted on behalf of BenchLab LLC:



Anthony Forte

Director of Operations | Designated Project Manager

BenchLab LLC | Middletown, Maryland

[Phone] | [Email]

304-288-6614 AFORTE@benchlabsolutions.com

Date: June 4, 2026

Patrick Barber

President / Executive Sponsor

BenchLab LLC

Date: June 4, 2026

END OF TECHNICAL PROPOSAL

Cost Proposal submitted under separate sealed cover

IIS Baseline Requirements Traceability Matrix (RTM)

Vendor Response — BenchLab LLC / BlueLot Intelligence Platform

Solicitation: CRFP 0506 MIS2600000002
Agency: WV Dept. of Health, Bureau of Public Health – Epidemiology Services
Vendor: BenchLab LLC
Solution: BlueLot Intelligence Platform
Submission Date: June 4, 2026
RTM Version: PHII/AIRA IIS Baseline Requirements RTM – July 2025
Prepared By: Anthony Forte, Director of Operations

Response Key	Description
Yes	BlueLot fully meets this requirement out-of-the-box with no modification.
Yes with customization	BlueLot meets this requirement with configuration or customization during implementation. Comment required.
No	BlueLot does not currently meet this requirement.
Priority Codes:	E = Essential (baseline critical requirement) O = Optional (not required for all IIS)
Note:	<i>All 'Yes with customization' responses include estimated implementation timeline in the Vendor Comments column.</i>

IIS RTM Response Summary — BenchLab LLC / BlueLot

Function Tab	Total Reqs	Essential	Optional	Yes	Yes w/Cust.	No
Administer System	61	53	8	60	1	0
Manage Organizations-Facilities	81	66	15	79	2	0
Manage Users	35	25	10	35	0	0
Support Interoperability	64	59	5	64	0	0
Ensure Data Quality	32	32	0	32	0	0
Evaluate and Forecast	64	45	19	64	0	0
Manage Patient-Imm Records	81	65	16	81	0	0
Manage Vaccine Inventory	87	68	19	86	1	0
Provide Data Access	60	50	10	60	0	0
Non-Functional	99	84	15	98	1	0
TOTAL	664	547	117	659	5	0

100.0% of requirements met (Yes + Yes w/Customization)

Function: Administer System

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Hierarchy Configuration	ability to establish the IIS hierarchy to associate and manage relationships between entities	E	Yes	BlueLot supports fully configurable multi-level jurisdictional hierarchies.
Hierarchy Configuration	ability to associate user(s) to a facility	E	Yes	Users are assigned to one or more facilities via role-based assignment workflows.
Hierarchy Configuration	ability to associate clinician(s) to a facility	E	Yes	Clinician-facility associations managed through the provider management module.
Hierarchy Configuration	ability to associate facility/facilities to an organization	E	Yes	Facilities linked to parent organizations; can belong to multiple organizations.
Hierarchy Configuration	ability to establish geographic jurisdictional hierarchy	E	Yes	Geographic hierarchy (state, county, region, district) is fully configurable.
Hierarchy Configuration	ability to aggregate data across user-defined hierarchies	E	Yes	Reporting supports aggregation at any defined hierarchy level.
System Configuration	ability to maintain inventory availability in IIS visible to authorized users	E	Yes	Inventory availability displayed in real-time to users with appropriate role-based access.
System Configuration	ability for jurisdictional admin to maintain separate VFC supplied inventory	E	Yes	VFC inventory tracked in a separate funding source bucket from private and jurisdiction-supplied stock.
System Configuration	ability for jurisdictional admin to maintain separate jurisdiction supplied inventory	E	Yes	Jurisdiction-supplied inventory maintained in a distinct funding category.
System Configuration	ability for jurisdictional admin to maintain separate private stock inventory	E	Yes	Private stock tracked separately with independent reporting.
System Configuration	ability for jurisdictional admin to manage code sets	E	Yes	NDC, CVX, MVX, and other code sets fully manageable by jurisdictional admin.
System Configuration	ability for jurisdictional admin to update NDC codes	E	Yes	NDC code tables maintained by jurisdictional admin and updated on a configurable schedule.
System Configuration	ability for jurisdictional admin to update CVX codes	E	Yes	CVX vaccine codes updated by jurisdictional admin and propagated across all functions.
System Configuration	ability for jurisdictional admin to update MVX codes	E	Yes	MVX manufacturer codes maintained in the code management module.

Function: Administer System

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
System Configuration	ability to configure default values to minimize data input	E	Yes	Default values configurable for all data entry fields to reduce repetitive input.
System Configuration	ability to display an error message when minimum information required is not complete	E	Yes	Inline validation messages displayed in real-time when required fields are incomplete or invalid.
System Configuration	ability to standardize addresses per US Postal conventions and codes	E	Yes	Address standardization performed against USPS conventions and codes at point of entry.
System Configuration	ability to verify validity of addresses (e.g., SmartyStreets)	E	Yes	BlueLot integrates with SmartyStreets API for real-time USPS address validation.
System Configuration	ability to geocode addresses	E	Yes	Geocoding applied to validated addresses for geographic analysis and mapping.
System Configuration	ability to validate accurate assignment of address to an individual (e.g., LexisNexis)	E	Yes with customization	Address-individual validation via LexisNexis will be configured during implementation per jurisdictional policy. Est: 4 weeks.
System Configuration	ability for jurisdictional admin to modify facility types per CDC VFC Program descriptions	E	Yes	Facility type codes fully configurable by jurisdictional admin.
System Configuration	ability for jurisdictional admin to configure rules governing data validation of incoming HL7 messages	E	Yes	HL7 message validation rules configurable per jurisdictional policy.
System Configuration	ability to configure an authorization agreement as per jurisdictional policy	O	Yes	Authorization agreement configuration supported through the enrollment module.
System Configuration	ability to configure a user agreement as per jurisdictional policy	O	Yes	User agreement terms configurable and presented to users upon registration.
System Configuration	ability to display age in year/month/day format in all age display fields	E	Yes	Age displayed as Y years, M months, D days throughout all patient-facing screens.
System Configuration	ability to provide optional calendar to select a date in a web client	O	Yes	Date picker calendars available on all date entry fields in the web client.
System Configuration	ability to add patient priority group indicators	E	Yes	Patient priority group indicators configurable and assignable at the patient record level.
System Configuration	ability to modify patient priority group indicators	E	Yes	Priority group indicators updatable by authorized users per jurisdictional policy.

Function: Administer System

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
System Configuration	ability for jurisdictional admin to manage business rules related to data quality	E	Yes	Data quality business rules configurable in the rules management engine with full audit logging.
System Configuration	ability for jurisdictional admin to specify business rules for monitoring data quality	E	Yes	Data quality monitoring rules defined and scheduled through the admin configuration interface.
System Configuration	ability for jurisdictional admin to modify business rules for monitoring data quality	E	Yes	Existing data quality rules can be edited, versioned, and redeployed by jurisdictional admin.
System Configuration	ability to configure the organization enrollment form	E	Yes	Organization enrollment forms fully configurable by jurisdictional admin.
System Configuration	support rules-based logic to suggest approval or rejection of enrollment form	E	Yes	Rules-based auto-review logic generates approval/rejection recommendations.
System Configuration	ability to manage rules-based logic for approval or rejection of enrollment form	E	Yes	Enrollment approval rules managed through the admin interface with version control.
System Configuration	ability for jurisdictional admin to create enrollment forms based on program requirements	E	Yes	Multiple enrollment form templates can be created per vaccine program.
System Configuration	ability for jurisdictional admin to modify an enrollment form	E	Yes	Enrollment forms modifiable by jurisdictional admin with changes logged.
System Configuration	ability to auto-populate existing user information when creating a new facility	O	Yes	Registered user's profile information automatically pre-populated in new facility enrollment.
System Configuration	ability to auto-populate organization information when creating a new organization	O	Yes	Organization information from enrollment form propagated to the organization record.
System Configuration	ability for jurisdictional admin to configure vaccine forecasting business rules	E	Yes	Vaccine forecasting business rules including ACIP schedule parameters fully configurable.
System Configuration	ability to apply effective dates to vaccine rules	O	Yes	Effective and expiration dates configurable for all vaccine forecasting rules.
System Configuration	ability to incorporate new vaccines per ACIP into the forecasting algorithm	E	Yes	New ACIP-recommended vaccines incorporated into the CDSi-aligned forecasting engine.
System Configuration	ability to support a record search algorithm to return 'best matches'	E	Yes	Patient search returns probabilistically ranked matches with configurable thresholds.

Function: Administer System

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
System Configuration	ability for jurisdictional admin to configure the number of search results displayed	E	Yes	Search result display limits configurable by jurisdictional admin in system settings.
System Configuration	ability for jurisdictional admin to modify required parameters for patient searches	E	Yes	Required search parameters configurable by jurisdictional admin.
System Configuration	ability to restrict certain data from being included in reports	E	Yes	Report configurations support field-level suppression of sensitive demographic data.
System Configuration	ability to open multiple screens simultaneously within the application	O	Yes	BlueLot supports multiple concurrent browser tabs with independent session contexts.
User Roles and Permissions	ability for jurisdictional admin to manage user roles and permissions by task	E	Yes	Role-based access control fully configurable with task-level permission granularity.
User Roles and Permissions	ability for jurisdictional admin to add user roles with distinct permissions	E	Yes	New user roles with custom permission sets created by jurisdictional admin at any time.
User Roles and Permissions	ability for jurisdictional admin to modify user roles with distinct permissions	E	Yes	Existing roles modifiable with changes automatically propagated to all assigned users.
User Roles and Permissions	ability for jurisdictional admin to inactivate user roles	E	Yes	User roles can be inactivated; affected users notified and access suspended.
User Roles and Permissions	ability for jurisdictional admin to modify permissions to IIS processes and data for specific user roles	E	Yes	Process-level and data-level permissions individually configurable per role.
User Roles and Permissions	ability for jurisdictional admin to restrict system functionality by user role	E	Yes	System functionality restricted at role level — menus, actions, and data views filtered by role.
User Roles and Permissions	ability for jurisdictional admin to restrict authorized user access to data based on user role	E	Yes	Data access restrictions enforced at role level including patient record and organization scope.
User Roles and Permissions	ability for jurisdictional admin to enable access to standard reports based on user role	E	Yes	Standard report visibility configurable per role.
User Roles and Permissions	ability to automatically update all users assigned to a role based on changes to the master role	E	Yes	Role changes propagate automatically to all assigned users in real-time.
System Alerts	ability for jurisdictional admin to manage system alerts	E	Yes	System-wide alert management available to jurisdictional admins.

Function: Administer System

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
System Alerts	ability to view global messages upon logging into the application	E	Yes	Global system messages displayed to all applicable users on the login landing page.
System Alerts	ability for jurisdictional admin to add system alerts for specific IIS users	O	Yes	Targeted alerts directed to specific users or user groups displayed upon login.
System Alerts	ability for jurisdictional admin to add global messages	E	Yes	Global messages created and published to all IIS users through the admin console.
System Alerts	ability for jurisdictional admin to edit global messages	E	Yes	Existing global messages editable with changes taking effect immediately upon save.
System Alerts	ability for jurisdictional admin to inactivate global messages	E	Yes	Global messages inactivated on a scheduled date or immediately.

Total: 61 | Essential: 53 | Optional: 8 | Yes: 60 | Yes w/Customization: 1 | No: 0

Function: Manage Organizations-Facilities

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Organization/Facility	ability to search organization/facility information stored in the IIS	E	Yes	Full-text and parameter-based search across all organization and facility records.
Organization/Facility	ability for jurisdictional admin to search organizations/facilities by user-defined parameters	E	Yes	Advanced search supports NPI, name, address, facility type, and status.
Organization/Facility	ability to clear and re-enter search criteria when searching for an organization/facility	E	Yes	Search forms include a clear/reset function.
Add, Edit, Inactivate	ability for applicant from unauthorized organization to enroll electronically for IIS participation	E	Yes	Self-service online enrollment portal available for unenrolled organizations.
Add, Edit, Inactivate	ability for applicant to submit IIS enrollment information online	E	Yes	Complete enrollment application submitted electronically through the public-facing portal.
Add, Edit, Inactivate	ability for applicant to edit rejected IIS enrollment information	E	Yes	Rejected enrollment applications can be edited and resubmitted.
Add, Edit, Inactivate	ability for applicant to save partially complete IIS enrollment information	O	Yes	Partial enrollment applications saved as drafts for later completion.
Add, Edit, Inactivate	ability for applicant to return to a partially complete IIS enrollment	O	Yes	Draft enrollment applications accessible via secure resumption link.
Add, Edit, Inactivate	ability to prevent submission of incomplete IIS enrollment when required fields are missing	E	Yes	Form validation prevents submission with missing required fields.
Add, Edit, Inactivate	ability to electronically notify applicant of incomplete enrollment specifying missing required fields	E	Yes	Automated email notifications identify specific missing fields.
Add, Edit, Inactivate	ability to electronically notify applicant that IIS enrollment information has been submitted	E	Yes	Confirmation notifications sent immediately upon successful submission.
Add, Edit, Inactivate	ability for applicant to resubmit a rejected IIS enrollment	E	Yes	Applicants receive rejection notifications with reason codes and can resubmit.
Add, Edit, Inactivate	ability to capture electronic signature for enrollment and authorization agreement	O	Yes	Electronic signature capture supported on enrollment and authorization agreement forms.
Add, Edit, Inactivate	ability for jurisdictional admin to manage organization/facility IIS enrollment	E	Yes	Admins manage complete enrollment lifecycle including review, approval, rejection.

Function: Manage Organizations-Facilities

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Add, Edit, Inactivate	ability for jurisdictional admin to manage enrollment status	E	Yes	Enrollment status transitions (active, inactive, pending, rejected) managed by admin.
Add, Edit, Inactivate	ability for jurisdictional admin to deactivate an organization	E	Yes	Organizations can be deactivated with effective date, preserving historical data.
Add, Edit, Inactivate	ability for jurisdictional admin to reactivate an organization	E	Yes	Inactivated organizations can be reactivated with full reinstatement of access.
Add, Edit, Inactivate	ability for jurisdictional admin to add an organization	E	Yes	New organizations created directly by jurisdictional admin.
Add, Edit, Inactivate	ability for jurisdictional admin to deactivate a facility	E	Yes	Individual facilities can be deactivated independently of their parent organization.
Add, Edit, Inactivate	ability for jurisdictional admin to reactivate a facility	E	Yes	Inactivated facilities can be reactivated with full restoration of capabilities.
Add, Edit, Inactivate	ability for jurisdictional admin to electronically approve IIS enrollment	E	Yes	Enrollment approval workflow executed electronically with automated notifications.
Add, Edit, Inactivate	ability to include reason for rejecting IIS enrollment of an organization	E	Yes	Rejection reasons captured, displayed to applicant, and stored in enrollment history.
Add, Edit, Inactivate	ability to electronically notify the organization that enrollment was rejected along with the reason	E	Yes	Automated rejection notifications include the specific reason code and resubmission guidance.
Add, Edit, Inactivate	ability for jurisdictional admin to manage organization and facility records within the IIS	E	Yes	Full CRUD management of organization and facility records.
Add, Edit, Inactivate	ability for jurisdictional admin to add an organization record	E	Yes	Organization records created with all required demographic and program affiliation fields.
Add, Edit, Inactivate	ability for jurisdictional admin to modify an organization record	E	Yes	All organization record fields editable with change audit logging.
Add, Edit, Inactivate	ability for jurisdictional admin to add a facility	E	Yes	New facility records created with full address, contact, and program data.
Add, Edit, Inactivate	ability for jurisdictional admin to modify a facility record	E	Yes	Facility records fully editable with change history retained.

Function: Manage Organizations-Facilities

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Add, Edit, Inactivate	ability to automatically generate unique facility IIS ID	E	Yes	Unique IIS facility IDs auto-generated at creation and cannot be modified.
Add, Edit, Inactivate	ability for jurisdictional admin to associate a facility to an organization	E	Yes	Facilities associated to organizations through the facility management interface.
Add, Edit, Inactivate	ability for jurisdictional admin to edit association between a facility and an organization	E	Yes	Facility-organization associations updatable with effective date tracking.
Add, Edit, Inactivate	ability to store multiple unique facility site IDs associated with a particular facility	E	Yes	Multiple external system IDs (NPI, state license) stored per facility for cross-system matching.
Add, Edit, Inactivate	ability to capture a facility's mailing address	E	Yes	Mailing addresses captured separately from physical/shipping addresses.
Add, Edit, Inactivate	ability to capture a facility's shipping address	E	Yes	Shipping addresses stored for vaccine order delivery coordination.
Add, Edit, Inactivate	ability to enter contact information for the facility contact	E	Yes	Primary facility contact information captured per facility.
Add, Edit, Inactivate	ability to enter contact information for an optional contact	E	Yes	Secondary and additional contacts added to each facility record.
Add, Edit, Inactivate	ability to indicate if an organization/facility is a site where immunizations are administered	E	Yes	Immunization administration site designation is a configurable facility flag.
Add, Edit, Inactivate	ability to indicate if a site stores vaccines for redistribution	O	Yes	Redistribution site designation supported as a configurable facility attribute.
Add, Edit, Inactivate	ability to save documents to organization/facility file folder	E	Yes	Document management supports file attachment to records with configurable document type categories.
Add, Edit, Inactivate	ability for jurisdictional admin to retrieve electronic files from provider file folder	E	Yes	Jurisdictional admins can access, download, and manage all documents in facility file folders.
Add, Edit, Inactivate	ability to record notes related to an organization/facility	E	Yes	Freetext and categorized notes supported with user and timestamp tracking.
Add, Edit, Inactivate	ability to flag an organization as participating in VFC and/or other vaccine programs	E	Yes	Organizations flagged for VFC and other program participation with enrollment date tracking.

Function: Manage Organizations-Facilities

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Add, Edit, Inactivate	ability to retrieve organization/facility info from scanned forms to auto-fill fields	O	Yes with customization	<i>OCR-based form extraction for auto-populating facility data can be configured as an integration. Estimated: 6 weeks.</i>
VFC/Vaccine Program	ability for an organization to submit vaccine program enrollment information electronically	E	Yes	Online VFC/vaccine program enrollment forms submitted electronically through the provider portal.
VFC/Vaccine Program	ability to capture electronic signature for vaccine program enrollment	E	Yes	E-signature capture integrated into the vaccine program enrollment workflow.
VFC/Vaccine Program	ability to access the vaccine program agreement in a separate window	E	Yes	Program agreement opens in a separate window without interrupting the enrollment form.
VFC/Vaccine Program	ability to provide link to the blank formatted vaccine program enrollment form	E	Yes	Downloadable blank enrollment form accessible from the enrollment portal.
VFC/Vaccine Program	ability for jurisdictional vaccine program admin to assign a VFC pin number to a newly enrolled VFC site	E	Yes	VFC PIN assignment managed by jurisdictional vaccine program admins.
VFC/Vaccine Program	ability to select the type of certified monitoring device being used to record temperatures	E	Yes	Temperature monitoring device types selected from a configurable dropdown during facility enrollment.
VFC/Vaccine Program	ability to document that a facility has a certificate of calibration for the temperature monitoring device	O	Yes	Calibration certificate documentation and expiration tracking supported per facility.
VFC/Vaccine Program	ability for jurisdictional vaccine program admin to approve a vaccine program enrollment	E	Yes	Enrollment approvals executed with automated provider notification.
VFC/Vaccine Program	ability for jurisdictional vaccine program admin to enter an expiration date for enrollment	E	Yes	Enrollment expiration dates tracked and trigger re-enrollment notifications.
VFC/Vaccine Program	ability to document that the vaccine program facility has a routine and emergency vaccine management plan	E	Yes	Vaccine management plan documentation status tracked per facility.
VFC/Vaccine Program	ability to document that a VFC facility has a VFC Coordinator annual training certificate	E	Yes	VFC Coordinator training certificate status and expiration tracked per facility.
VFC/Vaccine Program	ability to document that a VFC facility has a Backup Coordinator annual training certificate	E	Yes	Backup Coordinator training certificate status tracked with expiration alerts.
VFC/Vaccine Program	ability for jurisdictional vaccine program admin to add comments during enrollment approval	E	Yes	Comments captured at each enrollment workflow stage and retained in history.

Function: Manage Organizations-Facilities

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
VFC/Vaccine Program	ability to require vaccine program facility to indicate the number of storage units being monitored	O	Yes	Number of monitored storage units captured per jurisdictional policy configuration.
VFC/Vaccine Program	ability to require facility to indicate the types of vaccine storage units being monitored	O	Yes	Storage unit type selection configurable per enrollment form.
VFC/Vaccine Program	ability to require facility to indicate whether they store Varicella and MMRV vaccine	E	Yes	Varicella and MMRV storage attestation captured during enrollment and updated at re-enrollment.
VFC/Vaccine Program	ability to enter contact information for the facility Primary Vaccine Coordinator	E	Yes	Primary Vaccine Coordinator name, phone, email, and NPI captured and validated per enrollment.
VFC/Vaccine Program	ability to enter contact information for the facility Backup Vaccine Coordinator	E	Yes	Backup Vaccine Coordinator contact information captured and stored per facility record.
VFC/Vaccine Program	ability to enter contact information for the facility vaccine program Agreement Signatory	E	Yes	Agreement Signatory contact and credential information captured and retained per enrollment.
VFC/Vaccine Program	ability to capture the day of the week a vaccine program facility may receive vaccine shipments	E	Yes	Delivery day preferences captured per facility.
VFC/Vaccine Program	ability to capture the time a vaccine program facility may receive vaccine shipments	E	Yes	Delivery time windows captured per facility to support scheduling coordination.
VFC/Vaccine Program	ability to automatically turn off vaccine ordering for a facility without an up-to-date enrollment	E	Yes	Ordering capabilities automatically suspended for facilities with expired or inactive enrollments.
VFC/Vaccine Program	ability to capture required information for VFC clinician	E	Yes	All required VFC clinician data elements captured during enrollment with validation rules.
VFC/Vaccine Program	ability to attach VFC documentation in multiple formats	E	Yes	Multi-format document attachment (PDF, Word, image) supported on VFC enrollment and facility records.
VFC/Vaccine Program	ability for IIS staff to retrieve electronic files from organization/facility file folder	O	Yes	IIS staff can access facility file folders through the administrative interface.
VFC/Vaccine Program	ability to automatically validate clinician license number against Professional Licensing Agency database	E	Yes with customization	<i>Automated clinician license validation against WV Professional Licensing Agency database configured during implementation. Estimated: 4-6 weeks.</i>
VFC/Vaccine Program	ability to submit vaccine program re-enrollment data electronically	E	Yes	Re-enrollment submitted electronically with pre-population of existing enrollment data.

Function: Manage Organizations-Facilities

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
VFC/Vaccine Program	ability to electronically notify a facility of an upcoming need for VFC re-enrollment	O	Yes	Automated re-enrollment reminder notifications sent at configurable intervals.
VFC/Vaccine Program	ability for jurisdictional admin to modify the date for online renewal notifications	E	Yes	Re-enrollment notification dates adjustable per facility by jurisdictional admins.
VFC/Vaccine Program	ability to suspend ordering capabilities pending approval of vaccine program enrollment	E	Yes	Ordering suspended upon enrollment submission until approval is granted.
VFC/Vaccine Program	ability to re-activate ordering when a vaccine program enrollment is approved	E	Yes	Ordering capabilities automatically reinstated upon enrollment approval.
Organization/Facility	ability to send electronic communications to organization/facility contacts	E	Yes	Automated and manual email notifications sent directly from the IIS to contacts.
Organization/Facility	ability to send a final electronic notification reminder for renewal to all VFC facilities	E	Yes	Final renewal reminder notifications sent to all VFC facilities with incomplete renewals.
Organization/Facility	ability to send electronic communications directly from the IIS to multiple recipients	O	Yes	Bulk communication to multiple recipients supported through the IIS messaging center.
Organization/Facility	ability to notify more than one user at a participating vaccine program facility	O	Yes	Multiple facility contacts designated as notification recipients per notification category.
Organization/Facility	ability for jurisdictional admin to customize vaccine program enrollment alerts	O	Yes	Alert content and timing fully customizable by jurisdictional vaccine program admins.
Organization/Facility	ability to modify the date for online renewal notifications for each participating facility	O	Yes	Notification dates adjustable per facility by jurisdictional admins.
Organization/Facility	ability to electronically notify the jurisdictional vaccine program admin of vaccine program follow-up activities for a new facility enrolled for 6 months	O	Yes	Automated 6-month follow-up notifications triggered for new facility enrollments.

Total: 81 | Essential: 66 | Optional: 15 | Yes: 79 | Yes w/Customization: 2 | No: 0

Function: Manage Users

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
User Search	ability for jurisdictional admin to search for user accounts by user-defined criteria	E	Yes	User account search supports name, username, organization, role, and status criteria.
User Search	ability for jurisdictional admin to view all user accounts	E	Yes	Jurisdictional admins have access to a complete user account directory.
User Search	ability for organization admin to search all user accounts associated with their organization	E	Yes	Organization admins can search and view all user accounts in their organization.
User Search	ability for organization admin to view all user accounts associated with their organization	E	Yes	Organization admins have a filtered user directory showing only their organization's users.
User Search	ability to sort users by user defined-criteria	O	Yes	User lists support sorting by name, role, organization, last login, and other criteria.
Add, Edit, Inactivate User	ability for admin to manage user accounts	E	Yes	Full user account lifecycle management available to admins.
Add, Edit, Inactivate User	ability to track the progress of a new user registration	O	Yes	New user registration status tracked through a workflow with status indicators.
Add, Edit, Inactivate User	ability for admin to add new users	E	Yes	New user accounts created with role assignment through the user management interface.
Add, Edit, Inactivate User	ability for admin to modify user accounts	E	Yes	User account attributes including contact information, role, and organization are editable.
Add, Edit, Inactivate User	ability for admin to inactivate user accounts	E	Yes	User accounts inactivated with effective date, preserving audit history.
Add, Edit, Inactivate User	ability for jurisdictional admin to inactivate multiple accounts in one transaction	O	Yes	Bulk inactivation of multiple user accounts supported.
Add, Edit, Inactivate User	ability for organization admin to inactivate user accounts associated with their organization	E	Yes	Organization admins can inactivate users within their organization.
Add, Edit, Inactivate User	ability to store reason for inactivation of user account	E	Yes	Inactivation reason codes and freetext notes stored in the user account history.
Add, Edit, Inactivate User	ability for jurisdictional admin to reactivate an inactivated account	E	Yes	Inactivated accounts reactivated with full access restoration.

Function: Manage Users

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Add, Edit, Inactivate User	ability to electronically notify a user that their account is locked per jurisdictional security policy	O	Yes	Automated notifications sent to users when accounts are locked.
Add, Edit, Inactivate User	ability to electronically notify a user that their account is inactive	O	Yes	Inactivity notifications sent to users upon account inactivation.
Add, Edit, Inactivate User	capture clinician activity status (out of state, loss of certification, change of practice status)	O	Yes	Clinician status tracking captures activity status changes with date and reason.
Add, Edit, Inactivate User	ability for jurisdictional admin to assign a role to authorized users	E	Yes	Role assignment performed by jurisdictional admins through the user management interface.
Add, Edit, Inactivate User	ability for organization admin to assign a role to authorized users within their organization	E	Yes	Organization admins assign pre-defined roles to users within their organization.
Authentication & Authorization	ability to authenticate user	E	Yes	Multi-factor authentication supported with username/password baseline and configurable second factors.
Authentication & Authorization	ability to access the system through an authorized username and password	E	Yes	Username/password authentication implemented with configurable complexity and expiration policies.
Authentication & Authorization	ability to support access via single-sign on for jurisdictional users	O	Yes	SSO integration supported via SAML 2.0 and OAuth 2.0.
Authentication & Authorization	ability to switch between multiple organizations	O	Yes	Users with multi-organization roles can switch organizational context without re-authentication.
Authentication & Authorization	ability to view jurisdictional policy agreements	E	Yes	Jurisdictional policy agreements accessible through the profile and settings interface.
Authentication & Authorization	support multi-factor authentication per jurisdictional policy	O	Yes	MFA configurable using TOTP, SMS, or email-based second factors.
Password Management	ability to generate electronic notification to authorized user of account credentials	E	Yes	Automated credential notifications sent via encrypted email upon account creation.
Password Management	ability to electronically notify authorized users of their username	E	Yes	Username reminder notifications sent to users upon request.
Password Management	ability to electronically notify authorized users of their temporary password in a separate notification	E	Yes	Temporary passwords delivered in a separate notification from username communications.

Function: Manage Users

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Password Management	ability to generate electronic notification at periodic intervals of pending account password expiration	E	Yes	Password expiration notifications sent at configurable intervals prior to expiration.
Password Management	ability for jurisdictional admin to configure the periodic intervals for password expiration notifications	O	Yes	Password expiration notification intervals configurable by jurisdictional admin.
Password Management	ability to support temporary password required to change during initial log in	E	Yes	Temporary passwords enforce a mandatory change on first login.
Password Management	ability to support temporary password which will expire in X number of days determined by policy	E	Yes	Temporary password expiration periods configurable per jurisdictional security policy.
Password Management	ability for users to change their own passwords per program/jurisdiction security policy	E	Yes	Self-service password change available through the account settings interface.
Password Management	ability for users to reset their password per program/jurisdiction security policy	E	Yes	Self-service password reset via email verification supported.
Password Management	ability to prompt users to change their password at time intervals per program/jurisdiction security policy	E	Yes	Periodic password change prompts enforced at configurable intervals.

Total: 35 | Essential: 25 | Optional: 10 | Yes: 35 | Yes w/Customization: 0 | No: 0

Function: Support Interoperability

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Onboarding	ability to onboard organizations/facilities to facilitate electronic data exchange	E	Yes	BlueLot provides a complete EHR/provider onboarding workflow for electronic data exchange setup.
Onboarding	ability to track an organization's/facility's progress through the onboarding process	O	Yes	Onboarding progress tracked through a status workflow visible to IIS staff and the organization.
Onboarding	ability to capture EHR system specification details	E	Yes	EHR system specifications including transport protocol, HL7 version, and interface details captured per organization.
Onboarding	ability to create a unique username to assign to organizations/facilities during the test phase	E	Yes	Test environment credentials created and assigned per organization during onboarding.
Onboarding	ability to create a unique password to assign to organizations/facilities during the test phase	E	Yes	Unique test passwords generated and delivered securely to onboarding organizations.
Onboarding	ability to electronically alert vendor/organization when the transport certificate is going to expire	E	Yes	Automated certificate expiration alerts sent at configurable intervals.
Onboarding	ability to store digital certificate information	E	Yes	Digital certificates for transport layer security stored and managed per organization/facility.
Onboarding	ability to validate that the transport layer between the test site and IIS is functional	E	Yes	Transport layer validation performed automatically during the onboarding test phase.
Onboarding	ability to validate system connectivity prior to the submission of test data	E	Yes	Pre-submission connectivity validation ensures the interface is operational.
Onboarding	ability to identify data formatting errors during testing	E	Yes	HL7 message validation identifies formatting errors during test submission.
Onboarding	ability to provide test message submission summary report to the EHR vendor	E	Yes	Test submission summary reports generated and delivered to EHR vendors.
Onboarding	ability for EHR vendor to view details regarding the processing of test data	E	Yes	EHR vendors have access to a test data processing dashboard showing error and warning details.
Onboarding	ability for IIS authorized staff to review and approve onboarding forms	E	Yes	Onboarding form review and approval managed by IIS staff.
Onboarding	ability for IIS staff to review and reject onboarding forms	E	Yes	Onboarding forms rejected with reason codes and automated notification.

Function: Support Interoperability

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Onboarding	ability for applicant to edit a rejected onboarding application	E	Yes	Rejected applications returned to applicant for correction and resubmission.
Onboarding	ability for applicant to save a rejected onboarding application	E	Yes	Rejected applications saved in draft status.
Onboarding	ability for applicant to resubmit a rejected onboarding application	E	Yes	Corrected onboarding applications resubmitted electronically.
Onboarding	ability to compare onboarding application information to current records to determine most current data	E	Yes	Application data compared against existing IIS records to identify conflicts.
Interfaces	ability to interface with other systems to facilitate electronic data sharing/exchange per jurisdictional policy	E	Yes	BlueLot supports configurable bi-directional interfaces with external systems.
Interfaces	ability to interface with electronic health record systems	E	Yes	HL7 v2.5.1 and FHIR R4 interfaces support bi-directional data exchange with EHR systems.
Interfaces	ability to interface with the Immunization Gateway	E	Yes	IZ Gateway connectivity implemented for bi-directional data exchange with the CDC IZ Gateway.
Interfaces	ability to interface with an application that facilitates patient scheduling	E	Yes	Patient scheduling system integration supported through configurable API and HL7 interfaces.
Interfaces	ability to exchange data with CDC VTrckS based on most current CDC ExIS Specifications	E	Yes	VTrckS integration implemented per current CDC ExIS specifications.
Interfaces	ability to order vaccine via electronic interface with VTrckS	E	Yes	Vaccine orders transmitted electronically to VTrckS through the certified ExIS interface.
Interfaces	ability to receive vaccine inventory/shipping information	E	Yes	Vaccine inventory and shipping data from VTrckS received and reconciled automatically.
Interfaces	ability to batch export vaccine inventory for submission to VTrckS	E	Yes	Inventory snapshots batch exported to VTrckS on a configurable schedule.
Interfaces	ability to batch export vaccine ordering information for submission to VTrckS	E	Yes	Vaccine order data batch exported to VTrckS per ExIS specifications.
Interfaces	ability to export vaccine return and wastage data to VTrckS	E	Yes	Vaccine return and wastage transactions exported to VTrckS with required data elements.

Function: Support Interoperability

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Interfaces	ability to use the VTrckS-API for file exchange between the IIS and VTrckS	O	Yes	VTrckS API integration implemented per current CDC API specifications.
Interfaces	ability to receive data through an interface with jurisdictional vital records system	E	Yes	Vital records interface receives birth, death, adoption, and name change events.
Interfaces	ability to update IIS data from Vital Records for birth events	E	Yes	Birth events automatically create or update patient demographic records in the IIS.
Interfaces	ability to update IIS data from Vital Records for death events	E	Yes	Death events trigger patient record status updates and suppress future reminders.
Interfaces	ability to update IIS data from Vital Records for adoption events	E	Yes	Adoption events update patient name and demographic data per adoption record information.
Interfaces	ability to update IIS data from Vital Records for name change events	E	Yes	Legal name change events update patient records while preserving prior name history.
Interfaces	ability to detect if a newborn record is a potential duplicate in the IIS	E	Yes	Probabilistic matching applied to incoming newborn records against existing IIS records.
Interfaces	ability to use new Vital Record data for matched records to update patient demographic data	E	Yes	Matched vital records data updates patient demographics with configurable field-level merge rules.
Interfaces	ability to update the IIS with date of death from Vital Records data	E	Yes	Date of death updated on patient records from vital records events.
Interfaces	ability to prevent updates to IIS records	O	Yes	Record update locks applied to specific records or types per jurisdictional policy.
Data Exchange	ability to support real-time data exchange per the CDC HL7 implementation guide	E	Yes	Real-time HL7 v2.5.1 data exchange implemented per CDC HL7 Implementation Guide.
Data Exchange	ability to process an HL7 message	E	Yes	HL7 VXU, QBP, RSP, and ACK messages processed in real-time with full validation.
Data Exchange	ability to respond to an HL7 message	E	Yes	HL7 acknowledgment and RSP responses generated per CDC HL7 specifications.
Data Exchange	ability to create an HL7 message	E	Yes	Outbound HL7 messages generated for query responses, batch transmissions, and notifications.

Function: Support Interoperability

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Data Exchange	ability to capture IIS Core Data Elements	E	Yes	All CDC-defined IIS Core Data Elements captured, stored, and transmitted per specification.
Data Exchange	ability to store IIS Core Data Elements	E	Yes	IIS Core Data Elements stored in structured fields with data type enforcement and audit logging.
Data Exchange	ability to accept last prior version of HL7 messages	E	Yes	The IIS accepts the current and immediately prior version of HL7 messages per CDC guidance.
Data Exchange	ability to manually correct a submitted record and resubmit for processing	O	Yes	Manual correction and resubmission of HL7 records supported.
Data Exchange	ability to support data exchange in non-HL7 format	E	Yes	Non-HL7 data exchange including CSV bulk import/export and FHIR-based exchange supported.
Data Exchange	ability to import bulk patient demographic information into IIS	E	Yes	Bulk patient demographic data imported via validated CSV/XML templates.
Data Exchange	ability to import bulk immunization information into IIS	E	Yes	Bulk immunization records imported with validation, deduplication, and error reporting.
Data Exchange	ability to export routine, seasonal, and emergency vaccination files (aggregate and de-identified)	E	Yes	Aggregate and de-identified vaccination data exports available in multiple formats.
Data Exchange	ability to export vaccination files automatically via CDC approved method	O	Yes	Automated scheduled export to CDC-approved destinations configurable.
Data Exchange	ability to monitor and troubleshoot data exchange	E	Yes	Data exchange monitoring dashboard provides real-time visibility into message volumes and error rates.
Data Exchange	ability to view VXU messages submitted by an organization	E	Yes	VXU message history viewable with filtering by organization, date range, and status.
Data Exchange	ability to view HL7 messages for an organization within a defined date range	E	Yes	HL7 message history supports date range filtering per jurisdictional retention policy.
Data Exchange	ability to view HL7 ACK messages generated for an organization	E	Yes	ACK message history accessible with full message content viewable for troubleshooting.
Data Exchange	ability to view incoming HL7 QBP messages submitted by an organization	E	Yes	QBP query messages logged and viewable by authorized staff.

Function: Support Interoperability

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Data Exchange	ability to view RSP messages generated for an organization	E	Yes	RSP response messages logged and viewable per organization.
Data Exchange	ability to log acknowledgement messages indicating warnings and errors	E	Yes	All ACK messages including warnings and error codes logged with full detail.
Data Exchange	ability to retrieve error messages within a specified date range by organization	E	Yes	Error message retrieval supports date range and organization filtering.
Data Exchange	ability to retrieve acknowledgment messages within a specified date range by organization	E	Yes	Acknowledgment messages retrievable by date range and organization.
Data Exchange	ability to filter error messages	E	Yes	Error message filtering supports error type, severity, organization, and date criteria.
Data Exchange	ability to filter acknowledgement messages	E	Yes	Acknowledgment messages filterable by status, organization, and date range.
Data Exchange	ability to sort error messages	E	Yes	Error messages sortable by date, severity, organization, and error type.
Data Exchange	ability to sort acknowledgement messages	E	Yes	Acknowledgment messages sortable by date, status, organization, and message type.

Total: 64 | Essential: 59 Optional: 5 | Yes: 64 Yes w/Customization: 0 No: 0

Function: Ensure Data Quality

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Patient Matching	ability to prevent duplicate patient records in the IIS database	E	Yes	Automated duplicate prevention checks run at patient record creation and HL7 message processing.
Patient Matching	ability to automatically identify incoming patient records as potential duplicates	E	Yes	Incoming records scored against existing records using probabilistic matching algorithms.
Patient Matching	ability to automatically identify existing patient records as potential duplicates	E	Yes	Periodic batch duplicate identification scans existing records.
Patient Matching	ability to automatically consolidate two or more duplicate records	E	Yes	Records meeting automatic consolidation thresholds merged per jurisdictional deduplication rules.
Patient Matching	ability to generate electronic notification of potential duplicates for manual review	E	Yes	Potential duplicate pairs below auto-merge threshold queued for manual review.
Patient Matching	ability to automatically match incoming patient record with existing records	E	Yes	Real-time matching prevents duplicate record creation during data entry and HL7 processing.
Patient Matching	ability to set thresholds for patient matching	E	Yes	Matching thresholds for auto-merge, manual review, and no-match configurable by jurisdictional admin.
Patient Matching	ability to view all potential duplicate patient records for an individual patient simultaneously	E	Yes	Deduplication interface displays all potential duplicate candidates for side-by-side comparison.
Patient Matching	ability for jurisdictional admin to edit thresholds to increase the probability of a match	E	Yes	Matching thresholds adjustable to increase match sensitivity.
Patient Matching	ability for jurisdictional admin to edit thresholds to reduce the probability of a match	E	Yes	Match thresholds reducible to narrow the duplicate candidate set.
Patient Matching	ability to flag potential duplicate patient records for manual review that cannot be resolved automatically	E	Yes	Records below auto-merge threshold automatically queued for manual review.
Patient Matching	ability to view all potential duplicate patient records simultaneously	E	Yes	All pending duplicate review cases displayed in a unified work queue.
Patient Matching	ability for admin to manually merge patient records	E	Yes	Manual merge workflow allows review, field-level selection, and merge completion.
Patient Matching	ability for organizational/facility user to manually merge patient records from their own org	E	Yes	Organization-level users can merge duplicate records within their own organization scope.

Function: Ensure Data Quality

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Patient Matching	ability to manually flag two or more patient records as potential duplicates	E	Yes	Users can manually flag any patient record pair for review queue entry.
Patient Matching	ability to prevent manual review of records previously indicated as 'not a duplicate'	E	Yes	Records marked 'not a duplicate' suppressed from future duplicate match queues.
Patient Matching	ability to flag a patient as 'not a duplicate' during manual review	E	Yes	Manual review includes a 'not a duplicate' resolution.
Patient Matching	ability to maintain 'not a duplicate' flag for resolved patient records	E	Yes	'Not a duplicate' flags retained indefinitely.
Patient Matching	ability to select data elements from the patient records to maintain within the consolidated record	E	Yes	Field-level selection during merge allows admins to choose the surviving value per data element.
Patient Matching	ability to retain 'pre-merged' records for reference	E	Yes	Pre-merge record snapshots retained in audit history.
Patient Matching	ability to separate patient records that were incorrectly merged	E	Yes	Incorrectly merged records can be unmerged with full restoration of pre-merge state.
Vaccination Event	ability to prevent potential duplicate vaccination events at the immunization level	E	Yes	Incoming vaccination events checked against existing records using vaccine, date, and patient matching.
Vaccination Event	ability to automatically identify incoming vaccination event as potential duplicates	E	Yes	Duplicate vaccination event detection runs at data entry and HL7 message processing.
Vaccination Event	ability to automatically select the most accurate vaccination event based on deduplication rules	E	Yes	Configurable deduplication rules determine which vaccination event is retained.
Vaccination Event	ability to automatically identify existing vaccination events as potential duplicates	E	Yes	Periodic batch scans identify potential duplicate vaccination events.
Vaccination Event	ability to manually flag potential duplicate vaccination events for manual review	E	Yes	Users can flag suspected duplicate vaccination events for manual review.
Vaccination Event	ability to display potential duplicate vaccine records for an individual patient	E	Yes	All potential duplicate vaccination events displayed in a comparison interface.
Vaccination Event	ability to manually merge a duplicate vaccination event	E	Yes	Manual vaccination event merge allows field-level selection of surviving data elements.

Function: Ensure Data Quality

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Vaccination Event	ability to manually delete a duplicate vaccination event	E	Yes	Duplicate vaccination events can be soft-deleted with reason documentation.
Vaccination Event	ability to automatically consolidate two or more duplicate vaccination events	E	Yes	Vaccination events meeting auto-consolidation criteria merged per deduplication rules.
Vaccination Event	ability to retain 'pre-merged' or 'pre-consolidated' vaccination events for reference	E	Yes	Pre-consolidation vaccination event data retained in audit history.
Vaccination Event	ability to separate vaccination events that were incorrectly merged or consolidated	E	Yes	Incorrectly merged vaccination events can be separated with full restoration of original event data.

Total: 32 | Essential: 32 Optional: 0 | Yes: 32 Yes w/Customization: 0 No: 0

Function: Evaluate and Forecast

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Clinical Decision Support	ability to provide immunization clinical decision support according to ACIP recommendations	E	Yes	BlueLot's CDSi-aligned forecasting engine evaluates patient immunization histories against current ACIP recommendations.
Clinical Decision Support	ability to support a vaccine clinical decision support algorithm aligned with the CDC CDSi logic specifications	E	Yes	Forecasting engine implemented per CDC CDSi logic specifications and validated against CDC test cases.
Clinical Decision Support	ability for jurisdictional admin to update the CDS rules	E	Yes	CDS rules updatable by jurisdictional admin with version control and effective date management.
Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Child and Adolescent schedule	E	Yes	Child and Adolescent Immunization Schedule evaluation fully implemented per current ACIP recommendations.
Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Catch-up schedule	E	Yes	Catch-up schedule evaluation implemented for patients who have fallen behind.
Clinical Decision Support	ability to evaluate a patient's immunization history according to the ACIP Adult Immunization Schedule	E	Yes	Adult Immunization Schedule evaluation covers all ACIP-recommended adult vaccines.
Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Child and Adolescent schedule	E	Yes	Child/Adolescent vaccine forecast generated showing due, overdue, and upcoming vaccines.
Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Catch-up Immunization Schedule	E	Yes	Catch-up forecasts generated for patients behind on recommended series.
Clinical Decision Support	ability to generate a vaccine forecast according to the ACIP Adult Immunization Schedule	E	Yes	Adult vaccine forecasts include all ACIP-recommended adult vaccines with due date calculations.
Clinical Decision Support	ability to display and highlight vaccines that are due	E	Yes	Due vaccines prominently displayed and highlighted in the patient immunization record view.
Clinical Decision Support	ability to display and highlight vaccines that are overdue	E	Yes	Overdue vaccines flagged with visual indicators.
Clinical Decision Support	ability to display an indication when a vaccine series is complete	E	Yes	Completed vaccine series marked with a completion indicator.
Clinical Decision Support	ability to display vaccine-specific contraindications according to CDC lists	O	Yes	CDC contraindication lists referenced in the clinical decision support display.
Clinical Decision Support	ability to take into account contraindications and precautions in the vaccine forecast	E	Yes	Recorded contraindications and precautions incorporated into the vaccine forecast algorithm.

Function: Evaluate and Forecast

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Clinical Decision Support	ability to take into account evidence of immunity in the vaccine forecast	E	Yes	Documented serologic evidence of immunity factored into forecasting.
Clinical Decision Support	ability to generate a forecast of specific vaccines required for individuals who travel outside the US	O	Yes	Travel vaccine forecasting available with CDC travel vaccine recommendations.
Clinical Decision Support	ability to maintain historical records of effective dates of previous forecast schedules	O	Yes	Forecast schedule version history maintained for audit and retroactive evaluation.
Clinical Decision Support	ability to review an immunization schedule appropriate at the time of administration	O	Yes	Historical schedule review displays the ACIP schedule in effect at the time of each vaccination.
Clinical Decision Support	ability to apply an immunization schedule appropriate at the time of administration	O	Yes	Historical schedule application enables correct evaluation using the schedule effective at administration date.
Clinical Decision Support	ability to account for immune globulins in vaccine forecasting	E	Yes	Immune globulin administration dates captured and factored into forecast interval calculations.
Clinical Decision Support	ability to create test cases for reuse during user acceptance testing	E	Yes	Test case management allows creation, saving, and reuse of forecast test scenarios.
Clinical Decision Support	ability to save test cases for reuse during user acceptance testing	E	Yes	Saved test cases stored in the testing library.
Clinical Decision Support	ability to compare the expected results of the forecasting test case to the actual results observed	E	Yes	Test case comparison displays expected vs. actual forecast results with pass/fail indicators.
Reminder/Recall	ability to generate patient-specific reminder/recall notifications	E	Yes	Patient-specific reminder and recall notifications generated based on forecast due dates.
Reminder/Recall	ability to select one or more vaccines for generating reminder/recall notifications	E	Yes	Reminder/recall generation supports selection of specific vaccine(s) or all due/overdue vaccines.
Reminder/Recall	ability to view the date the reminder/recall notice was sent to a patient	O	Yes	Notification send dates recorded per patient and viewable in the patient communication history.
Reminder/Recall	ability to generate lists of patients in need of a reminder or recall notification by organization	E	Yes	Patient lists for reminder/recall generated by organization with configurable due date ranges.
Reminder/Recall	ability to generate reminder/recall notifications per consent designation	E	Yes	Reminder/recall generation respects patient consent designations.

Function: Evaluate and Forecast

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Reminder/Recall	ability to generate patient-specific reminder/recall notices by user-defined parameters	E	Yes	User-defined parameters filter reminder/recall lists.
Reminder/Recall	ability to generate reminder/recall in user-defined format	E	Yes	Reminder/recall output format configurable per notification run.
Reminder/Recall	ability to select the age of the cohort when generating reminder/recall notifications	E	Yes	Age cohort selection filters reminder/recall lists to specific age ranges.
Reminder/Recall	ability to print patient-specific reminder/recall notices by user-defined parameters	E	Yes	Printable reminder/recall notices generated per patient.
Reminder/Recall	ability to generate patient specific reminder/recalls in a user-defined format	E	Yes	Reminder/recall format including letter template and postcard is user-configurable.
Reminder/Recall	ability for an end user to generate patient specific reminder/recalls in accordance with HIPAA	E	Yes	All reminder/recall outputs comply with HIPAA minimum necessary standards.
Reminder/Recall	ability for an end user to print patient specific reminder/recalls in accordance with HIPAA	E	Yes	Printed reminder/recall materials comply with HIPAA and applicable jurisdictional policies.
Reminder/Recall	ability to generate vaccine recall notices by facility based on vaccine name, date range, and lot	O	Yes	Vaccine-specific recall notices targeting patients at specific facilities supported.
Reminder/Recall	ability to generate vaccine recall notices by administering provider based on vaccine name and date range	O	Yes	Provider-specific vaccine recall notice generation supported.
Reminder/Recall	ability to set the limit/number of times a patient will receive a reminder/recall	O	Yes	Reminder/recall frequency limits configurable per patient or cohort.
Reminder/Recall	ability to modify the limit/number of times a patient will receive a reminder/recall	O	Yes	Frequency limits modifiable per patient.
Reminder/Recall	ability to exclude a patient who has met the limit for a reminder/recall	O	Yes	Patients who have received the maximum number of notices automatically excluded.
Reminder/Recall	ability to generate a list of phone numbers for patients needing reminder/recall	O	Yes	Phone number lists exportable for call center or automated dialing use.
Reminder/Recall	ability to manually review a patient list for a reminder/recall notification	E	Yes	Patient lists for reminder/recall can be manually reviewed and edited before generation.

Function: Evaluate and Forecast

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Reminder/Recall	ability to flag patients to exclude before sending a reminder/recall notification	O	Yes	Individual patients manually excluded from a reminder/recall run prior to generation.
Reminder/Recall	ability to establish a time interval between reminder recall notices	O	Yes	Minimum intervals between notices per patient configurable per jurisdictional policy.
Reminder/Recall	ability to generate reminder/recall notifications for patients with an active status for their organization	E	Yes	Reminder/recall notifications filtered to patients with active status.
Reminder/Recall	ability to generate reports that include reminder/recall history for specific date range	O	Yes	Reminder/recall activity reports available with date range filtering.
Reminder/Recall	ability to make all reminder/recall data accessible to authorized users for a predetermined period	O	Yes	Reminder/recall data retention periods configurable per jurisdictional policy.
Reminder/Recall	ability to aggregate multiple notices going to the same address into one notification	O	Yes	Address-level aggregation consolidates multiple patient notices at the same address.
Coverage Reports	ability to generate report(s) displaying information on immunization coverage rates	E	Yes	Immunization coverage reports generated at multiple geographic and organizational levels.
Coverage Reports	ability to generate report(s) for organizations and facilities per CDC IQIP	E	Yes	IQIP-aligned coverage reports available for organizations and facilities.
Coverage Reports	ability to generate report(s) on immunization coverage for a user-defined geographic area	E	Yes	Geographic coverage reports support user-defined boundaries at state, county, and sub-county levels.
Coverage Reports	ability to generate report(s) on immunization coverage for a patient cohort	E	Yes	Cohort-based coverage reports evaluate immunization status for user-defined patient cohorts.
Coverage Reports	ability to view and modify list of patients to be included in immunization coverage report	O	Yes	Coverage report patient lists reviewable and modifiable prior to report generation.
Coverage Reports	ability to generate report(s) displaying immunization coverage trends over time	E	Yes	Coverage trend reports display historical coverage rates over configurable timeframes.
Coverage Reports	ability to generate report(s) that display the number of missed opportunities for vaccination	E	Yes	Missed opportunity reports identify patients who visited a facility but did not receive due vaccines.
Coverage Reports	ability to generate report(s) displaying the number of patients late up-to-date for immunization	E	Yes	Late-to-date coverage reports identify patients on catch-up schedules.

Function: Evaluate and Forecast

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Coverage Reports	ability to generate report(s) that display the number of invalid vaccine doses	E	Yes	Invalid dose reports identify doses administered outside ACIP minimum interval and age recommendations.
Coverage Reports	ability to generate report(s) displaying vaccine exemption rates	E	Yes	Exemption rate reports display medical and non-medical exemption counts.
Coverage Reports	ability to generate report(s) displaying immunization coverage by user-defined parameters	E	Yes	Coverage reports support fully user-defined parameter sets.
Coverage Reports	ability to generate report(s) displaying immunization coverage by vaccine type	E	Yes	Vaccine-type breakdown coverage reports available for all tracked antigens.
Coverage Reports	ability to generate report(s) displaying immunization coverage by age range	E	Yes	Age range coverage reports segment immunization status by user-defined age bands.
Coverage Reports	ability to generate report(s) displaying immunization coverage by ethnicity	E	Yes	Coverage reports include ethnicity disaggregation for health equity analysis.
Coverage Reports	ability to generate report(s) displaying immunization coverage by race	E	Yes	Race-disaggregated coverage reports available for all defined race categories.
Coverage Reports	ability to generate report(s) displaying immunization coverage by patient sex	O	Yes	Patient sex disaggregation available as a coverage report filter.

Total: 64 | Essential: 45 | Optional: 19 | Yes: 64 | Yes w/Customization: 0 | No: 0

Function: Manage Patient-Imm Records

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Patient Search	ability to search for patient records	E	Yes	Patient search available to all authorized users with configurable required and optional parameters.
Patient Search	ability to search patient record based on one or multiple user-defined parameters	E	Yes	Multi-parameter patient search supports name, DOB, address, ID, and other demographic fields.
Patient Search	ability to re-search for a patient record by modifying existing search parameters	E	Yes	Search parameters editable after initial search execution.
Patient Search	ability to display the list of returned possible patient matches per jurisdictional policy	E	Yes	Search results display ranked match candidates per jurisdictional display policy.
Patient Search	ability to select a patient record from the list of possible patient matches	E	Yes	Users select the target patient from the ranked match list to open the full record.
Add, Edit Patient	ability to add demographic information to a patient record	E	Yes	All CDC-endorsed core demographic data elements supported in patient record creation.
Add, Edit Patient	ability to create a new patient record	E	Yes	New patient records created through the UI or via HL7 VXU/ADT message processing.
Add, Edit Patient	ability to edit demographic information in a patient record	E	Yes	Patient demographic fields editable by authorized users with change audit logging.
Add, Edit Patient	ability to insert permanent comments in a patient's record	E	Yes	Permanent comments insertable on patient records with configurable visibility by role.
Add, Edit Patient	ability to display the user who created the permanent comment in a patient's record	E	Yes	Comment author identity and creation timestamp displayed alongside permanent comments.
Add, Edit Patient	ability to prevent a patient record from being saved unless required fields are completed	E	Yes	Required field validation prevents patient record save until all mandatory fields are completed.
Add, Edit Patient	ability to automatically notify a user when attempting to submit an incomplete patient record	E	Yes	Real-time inline notifications identify incomplete required fields before record submission.
Add, Edit Patient	ability to store CDC-endorsed core data elements for all patient records	E	Yes	All CDC IIS core data elements stored in structured, validated fields per CDC specifications.
Add, Edit Patient	ability to store multiple reported names for each patient (first, middle, last)	E	Yes	Multiple name records (current, prior, AKA) stored with effective date tracking.

Function: Manage Patient-Imm Records

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Add, Edit Patient	ability to store multiple patient addresses	E	Yes	Multiple addresses with type designations stored per patient.
Add, Edit Patient	ability to support multiple patient address type designations	O	Yes	Address type designations including primary, vacation, and temporary configurable.
Add, Edit Patient	ability to identify effective dates for use of a patient address	O	Yes	Effective and expiration dates tracked per patient address.
Add, Edit Patient	ability to store all historic addresses for a patient	O	Yes	All prior addresses retained in the patient address history with move-out dates.
Add, Edit Patient	ability to store country information related to where the patient was born	O	Yes	Birth country captured as a discrete data element.
Add, Edit Patient	ability to automatically create a unique patient ID number	E	Yes	Unique patient IDs auto-generated at record creation.
Add, Edit Patient	ability to automatically associate patient ID number to the patient's record	E	Yes	Auto-generated patient IDs immediately associated with all data elements.
Add, Edit Patient	ability to track patients of all ages per jurisdictional law or policy	E	Yes	Patient tracking not age-restricted; records for all ages supported.
Add, Edit Patient	ability to store mother's HBsAg status for a patient	O	Yes	Mother's HBsAg status captured as a discrete field in the newborn patient record.
Add, Edit Patient	ability to store a patient's occupation	E	Yes	Patient occupation stored as a discrete demographic field.
Add, Edit Patient	ability to designate patient as belonging to a priority group for vaccination	O	Yes	Priority group designations configurable and assignable to patient records.
Add, Edit Patient	ability to store multiple patient identifiers	E	Yes	Multiple patient identifiers (MRN, SSN last 4, Medicaid ID) stored with type coding.
Add, Edit Patient	ability to assign patient records to a cohort	E	Yes	Patients assignable to one or more cohorts.
Add, Edit Patient	ability to assign patient records to multiple cohorts	E	Yes	Multi-cohort assignment supported.

Function: Manage Patient-Imm Records

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Add, Edit Patient	ability to view patient records by cohort	E	Yes	Cohort views display all patient records assigned to a specific cohort.
Add, Edit Patient	ability to remove patient records from a cohort	E	Yes	Patients removable from cohorts by authorized users.
Patient Status	ability to manage patient status at the organization/facility level	E	Yes	Patient status managed independently at the organization/facility level.
Patient Status	ability to store active patient status at the organization/facility level	E	Yes	Active status stored and displayed at the organization/facility level.
Patient Status	ability to store inactive patient status at the organization/facility level	E	Yes	Inactive status with inactivation date and reason stored per organization/facility.
Patient Status	ability to edit active patient status at the organization/facility level	E	Yes	Active status can be updated by authorized organization/facility users.
Patient Status	ability to edit inactive patient status at the organization/facility level	E	Yes	Inactive status modifiable by authorized users.
Patient Status	ability to store reason for inactive status of patients at the organizational/facility level	E	Yes	Inactivation reason codes stored per organization/facility patient status record.
Patient Status	ability to edit multiple patients status in one action	O	Yes	Bulk patient status updates supported for multiple patients.
Patient Status	ability to manage patient status at the geographic jurisdictional level	E	Yes	Geographic jurisdictional-level patient status managed separately from organization-level status.
Patient Status	ability to store active patient status at the geographic jurisdiction level	E	Yes	Jurisdictional active status stored with effective date tracking.
Patient Status	ability to store inactive patient status at the geographic jurisdictional level	E	Yes	Jurisdictional inactive status stored with inactivation date and reason.
Patient Status	ability to edit active patient status at the geographic jurisdictional level	E	Yes	Jurisdictional active status editable by authorized jurisdictional admins.
Patient Status	ability to edit inactive patient status at the geographic jurisdictional level	E	Yes	Jurisdictional inactive status editable by authorized jurisdictional admins.

Function: Manage Patient-Imm Records

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Patient Status	ability to store reason for inactive status of patients at the geographic jurisdictional level	O	Yes	Jurisdictional inactivation reasons stored as discrete fields.
Patient Status	ability to restrict access to patient records in inactive status	O	Yes	Access restrictions for inactive patient records configurable by role.
Patient Status	ability to restrict edits to patient records in inactive status	O	Yes	Edit restrictions for inactive records configurable.
Patient Consent	ability to manage patient consent per jurisdictional policy	E	Yes	Patient consent management supports opt-in, opt-out, and no-response states.
Patient Consent	ability to update patient consent on a patient's record	E	Yes	Consent status updatable by authorized users with date and method of consent.
Patient Consent	ability to opt a patient out from participating in the IIS	E	Yes	Patient opt-out removes the record from public query responses.
Patient Consent	ability to opt in a patient for participation in the IIS	E	Yes	Patient opt-in restores full IIS participation status with effective date recording.
Patient Consent	ability to enable access to a patient record per consent designation	E	Yes	Record access automatically gated by the patient's current consent designation.
Patient Consent	ability to enable updates to a patient record per consent designation	E	Yes	Record update permissions enforced per the patient's consent designation.
Add, Edit Patient	ability to add vaccination event information to a patient record	E	Yes	Vaccination events added through the UI or via HL7 message processing.
Add, Edit Patient	ability to edit vaccine information in a patient record	E	Yes	Vaccination event data editable by authorized users with change audit logging.
Add, Edit Patient	ability to mark vaccine information in a patient record for deletion	O	Yes	Vaccination events marked for deletion with reason documentation.
Add, Edit Patient	ability to add reason for deletion of vaccine information in a patient record	O	Yes	Deletion reasons captured as required documentation.
Add, Edit Patient	ability to capture vaccine eligibility by vaccine dose for publicly purchased vaccine	E	Yes	VFC eligibility captured at the dose level for each publicly-purchased vaccine.

Function: Manage Patient-Imm Records

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Add, Edit Patient	ability to store vaccine eligibility by vaccine dose for publicly purchased vaccine	E	Yes	Dose-level VFC eligibility stored in the vaccination event record.
Add, Edit Patient	ability to report multiple doses administered to the same patient on the same administration date	E	Yes	Multiple vaccines administered in the same visit captured as separate dose records.
Add, Edit Patient	ability to store all CDC-endorsed core data elements related to vaccine events	E	Yes	All CDC vaccination event core data elements stored per specification.
Add, Edit Patient	ability to enter vaccination substandard or otherwise compromised flag	E	Yes	Substandard or compromised dose flags captured with reason codes.
Add, Edit Patient	ability to view submitted vaccination event information on a patient's record	E	Yes	All vaccination events viewable in the patient record.
Add, Edit Patient	ability to store adverse reactions in accordance with Vaccine Recommendations and Guidelines	E	Yes	Adverse reactions stored per VAERS reporting guidelines.
Add, Edit Patient	ability to flag an adverse reaction as having been reported to VAERS	E	Yes	VAERS reporting status flagged on the adverse reaction record.
Add, Edit Patient	ability to store patient vaccination event funding eligibility information	E	Yes	Funding eligibility stored per vaccination event for program accountability.
Add, Edit Patient	ability to print form for signature of vaccine refusal by patient for each vaccine antigen	O	Yes	Vaccine refusal forms printable per antigen for patient signature.
Add, Edit Patient	ability to ensure that the default lot number is from the oldest lot when entering an administered dose	E	Yes	Default lot number selection prioritizes the oldest active lot (FIFO).
Add, Edit Patient	ability to record administration of vaccination regardless if vaccine has since expired in inventory	E	Yes	Vaccinations administered from lots that have since expired are recorded with appropriate flags.
Add, Edit Patient	ability to track vaccinations that require adjuvant	E	Yes	Adjuvant-requiring vaccinations flagged and tracked with adjuvant type and lot number.
Print/Export Record	ability to securely print a patient immunization record	E	Yes	Patient immunization records printed securely with configurable content and watermarking.
Print/Export Record	ability to include evaluated history in the printable version of the patient record	E	Yes	Evaluated immunization history included in the printable patient record.

Function: Manage Patient-Imm Records

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Print/Export Record	ability to include the forecast in the printable version of the patient record	E	Yes	Vaccine forecast included as a section in the printable patient immunization record.
Print/Export Record	ability to include immunity in the printable version of the patient record	E	Yes	Documented immunity displayed in the printable record.
Print/Export Record	ability to securely export a patient immunization record	E	Yes	Patient records exported in secure formats (encrypted PDF, HL7) per jurisdictional policy.
Print/Export Record	ability to export a patient record in user-defined format	O	Yes	Export formats including PDF, CSV, and HL7 configurable per user preference.
Mass Vaccination	ability to support mass vaccination operations	E	Yes	Mass vaccination workflows support rapid patient and vaccination data capture.
Mass Vaccination	ability to rapidly capture patient demographic information offline during mass vaccination clinic	E	Yes	Offline data capture mode stores demographic information locally for later sync.
Mass Vaccination	ability to rapidly capture vaccine information offline during mass vaccination clinic	E	Yes	Vaccine information captured offline and synchronized upon reconnection.
Mass Vaccination	ability to support rapid capture of patient demographic information during mass vaccination clinic	E	Yes	Streamlined data entry reduces time required to capture patient demographics at mass vaccination sites.
Mass Vaccination	ability to support rapid capture of vaccine information during mass vaccination clinic	E	Yes	Vaccine administration data entry optimized for speed during mass vaccination events.
Mass Vaccination	ability to administer vaccines during public health emergency without impacting patient status	O	Yes	Emergency vaccination workflows allow administration without modifying patient consent or status.
Mass Vaccination	ability for jurisdictional admin to flag org/facility participation in mass vaccination event	O	Yes	Mass vaccination event participation flags assignable by jurisdictional admin.

Total: 81 | Essential: 65 | Optional: 16 | Yes: 81 | Yes w/Customization: 0 | No: 0

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Vaccine Inventory	ability to search inventory by user-defined parameters	E	Yes	Vaccine inventory search supports vaccine type, lot, NDC, funding source, and facility parameters.
Vaccine Inventory	ability to search the inventory by funding source	E	Yes	Funding source filtering isolates VFC, state, and private inventory.
Vaccine Inventory	ability to search inventory by vaccine type	E	Yes	Vaccine type search returns all lots and quantities for a selected antigen.
Vaccine Inventory	ability to search inventory by vaccine lot number	E	Yes	Lot number search returns complete inventory details for a specific lot.
Vaccine Inventory	ability to search inventory by vaccine NDC code	E	Yes	NDC code search returns all inventory records with a matching NDC.
Add, Edit Vaccine	ability to manage vaccine inventory	E	Yes	Full vaccine inventory lifecycle management: receiving, adjusting, transferring, and reconciling.
Add, Edit Vaccine	ability to support visualization of current vaccine inventory	E	Yes	Real-time inventory dashboards display quantities by vaccine, lot, facility, and funding source.
Add, Edit Vaccine	ability to edit inventory funding source at the lot level	E	Yes	Funding source editable at the lot level with change audit logging.
Add, Edit Vaccine	ability to edit inventory funding source at the vaccine level	E	Yes	Vaccine-level funding source adjustments supported for inventory reclassification.
Add, Edit Vaccine	ability to add vaccine information to inventory	E	Yes	New vaccine lots added with NDC, CVX, MVX, expiration date, lot number, and quantity.
Add, Edit Vaccine	ability to support barcode scanning system to electronically upload vaccine inventory	O	Yes with customization	Barcode scanner integration for inventory upload configured during implementation. Standard 1D/2D barcode formats supported. Est. 3-4 weeks.
Add, Edit Vaccine	ability to view current inventory list by facility	E	Yes	Facility-level inventory views display all active lots with current quantities.
Add, Edit Vaccine	ability to view current inventory list by organization	E	Yes	Organization-level inventory aggregates lot quantities across all associated facilities.
Add, Edit Vaccine	ability for jurisdictional admin to edit organization/facility inventory	E	Yes	Jurisdictional admins can edit inventory records for any organization or facility.

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Add, Edit Vaccine	ability to manage vaccine borrowed from lots belonging to one funding source to another	O	Yes	Vaccine borrowing transactions recorded with source and destination funding source tracking.
Add, Edit Vaccine	ability to reclassify funding source of borrowed vaccine for replacement cases	O	Yes	Funding source reclassification supported with full audit trail.
Add, Edit Vaccine	ability to view storage capability	E	Yes	Storage capability records display unit types, temperature ranges, and monitoring device information.
Add, Edit Vaccine	ability to document vaccine storage and handling events such as temperature excursions	E	Yes	Temperature excursion events documented with date, duration, temperature range, and affected lots.
Add, Edit Vaccine	ability to store storage capability	E	Yes	Storage capability configurations stored per facility.
Vaccine Ordering	ability for rule based logic to recommend vaccine order quantity	E	Yes	Order quantity recommendations calculated using rules-based logic incorporating inventory and administration history.
Vaccine Ordering	ability to alert user when 'reorder recommendation' inventory level is reached	O	Yes	Automated alerts notify users when inventory drops to the configured reorder threshold.
Vaccine Ordering	ability to pre-populate order with recommended quantities	E	Yes	Order forms pre-populated with recommended quantities.
Vaccine Ordering	ability to edit pre-populated order quantity	E	Yes	Pre-populated order quantities editable by authorized users prior to submission.
Vaccine Ordering	ability to order vaccines	E	Yes	Vaccine orders placed through the IIS ordering interface with VTrckS integration.
Vaccine Ordering	ability for jurisdictional admin to activate vaccines available for ordering	E	Yes	Available vaccines for ordering activated/deactivated by jurisdictional admins.
Vaccine Ordering	ability for jurisdictional admin to inactivate vaccines available for ordering	E	Yes	Vaccines removable from the ordering catalog by jurisdictional admins.
Vaccine Ordering	ability to order publicly purchased vaccines	E	Yes	VFC and other publicly-purchased vaccines orderable through the VTrckS-integrated interface.
Vaccine Ordering	ability to view all orders by user-defined parameters	O	Yes	Order history searchable by date range, status, facility, and vaccine.

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Vaccine Ordering	ability to update delivery hours to receive shipments	E	Yes	Delivery window preferences configurable per facility.
Vaccine Ordering	ability to enter a reason for vaccine orders outside the recommended order quantity	E	Yes	Orders deviating from recommended quantities require a reason code.
Vaccine Ordering	ability to search and view past vaccine orders by facility within a specified timeframe	E	Yes	Order history search supports facility-level filtering with date range parameters.
Vaccine Ordering	ability to verify contact information during each order without leaving ordering workflow	E	Yes	Contact information displayed and verifiable inline within the ordering workflow.
Vaccine Ordering	ability to update contact information during each order without leaving ordering workflow	E	Yes	Contact information editable inline within the ordering workflow.
Vaccine Ordering	ability to save an unsubmitted order	E	Yes	Orders in progress saved as drafts.
Vaccine Ordering	ability to update organization/facility contact information before submitting a vaccine order	E	Yes	Contact information updatable during the order review step.
Vaccine Ordering	ability to cancel unsubmitted or unprocessed vaccine orders	E	Yes	Draft and unprocessed orders cancellable by authorized users.
Vaccine Ordering	ability to edit unsubmitted or unprocessed vaccine orders	E	Yes	Draft orders editable until submission.
Vaccine Ordering	ability to save an unsubmitted order after rejection	E	Yes	Rejected orders saved and editable for correction.
Vaccine Ordering	ability to verify order information before order submitted	E	Yes	Order review screen displays complete order details before submission.
Vaccine Ordering	ability for jurisdictional admin to reject a vaccine order	E	Yes	Jurisdictional admins can reject submitted orders with reason codes.
Vaccine Ordering	ability for jurisdictional admin to select a reason code when rejecting an order	E	Yes	Configurable rejection reason codes selected during the rejection workflow.
Vaccine Ordering	ability to edit an order after rejection	E	Yes	Rejected orders returned to editable status.

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Vaccine Ordering	ability to resubmit an order after rejection	E	Yes	Corrected orders resubmitted through the ordering interface.
Vaccine Ordering	ability to electronically notify the facility of a rejected order	E	Yes	Automated rejection notifications with reason codes sent to the ordering facility.
Vaccine Ordering	ability to track the shipping status of orders	E	Yes	Shipping status tracking updated from VTrckS integration.
Vaccine Ordering	ability to verify packing slip information after order is shipped	O	Yes	Packing slip information verifiable against order details.
Vaccine Ordering	ability to receive electronic notification when order quantity received does not match vaccine order	O	Yes	Quantity discrepancy notifications generated.
Vaccine Ordering	ability to receive electronic notification when vaccine order received is damaged	O	Yes	Damage notifications generated and logged.
Vaccine Ordering	ability to request shipping label(s) for nonviable vaccine subject to return	O	Yes	Shipping label requests for vaccine returns initiated through the returns management interface.
Vaccine Ordering	ability to search for past vaccine returns within a specified timeframe	E	Yes	Return history searchable by date range, facility, and vaccine type.
Vaccine Ordering	ability to view past vaccine returns within a specified time frame	E	Yes	Past return records viewable with complete transaction details.
Vaccine Ordering	ability to pre-book vaccine orders	E	Yes	Pre-booking of vaccine orders for future delivery supported.
Vaccine Ordering	ability for jurisdictional admin to allocate vaccine inventory per user defined parameters	E	Yes	Inventory allocation rules configurable by jurisdictional admins.
Vaccine Ordering	ability to activate vaccine ordering for all designated organizations/facilities during a public health emergency	E	Yes	Emergency ordering activation can be applied to all designated facilities in a single action.
Vaccine Ordering	ability for jurisdictional admin to create order sets	E	Yes	Standard order sets configurable for common vaccine combinations.
Review/Approve Order	ability for jurisdictional admin to review order	E	Yes	Order review queue provides jurisdictional admins with complete order details.

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Review/Approve Order	ability to support a rules-based decision logic to approve or reject order	O	Yes	Rules-based auto-approval logic configurable for orders within defined quantity thresholds.
Review/Approve Order	ability for jurisdictional admin to approve order	E	Yes	Order approvals executed with automated notification to the facility.
Review/Approve Order	ability for jurisdictional admin to adjust order	E	Yes	Order quantities adjustable by jurisdictional admins during the review process.
Review/Approve Order	ability for jurisdictional admin to electronically accept VFC vaccine into inventory	E	Yes	VFC vaccine receipts electronically accepted and added to inventory.
Review/Approve Order	ability to accept each vaccine product in the IIS after shipment is received	E	Yes	Individual vaccine products accepted into inventory with lot verification.
Vaccine Dose	ability to automatically decrement vaccine doses from inventory when matched doses are reported as administered	E	Yes	Real-time inventory decrementing occurs automatically when administered doses are matched.
Vaccine Dose	ability to automatically match vaccine doses reported as administered to inventory for dose decrementing	E	Yes	Vaccine dose matching uses CVX, NDC, lot, and facility to identify the correct inventory lot.
Vaccine Dose	ability to automatically decrement vaccine inventory in real-time via HL7 messaging	E	Yes	HL7 VXU message processing triggers real-time inventory decrementing for matched doses.
Vaccine Dose	ability to automatically decrement vaccine inventory in real-time via UI data entry	E	Yes	UI-based vaccination data entry triggers real-time inventory decrementing upon save.
Vaccine Inventory	ability to reconcile vaccine doses in physical storage with vaccine doses reflected in system inventory	E	Yes	Inventory reconciliation workflow compares physical count with system records.
Vaccine Inventory	ability to document reductions in vaccine inventory due to outgoing vaccine transfers	E	Yes	Transfer-related inventory reductions documented with receiving facility and transfer date.
Vaccine Inventory	ability to electronically document reductions in vaccine inventory due to outgoing vaccine wastage	E	Yes	Wastage-related inventory reductions electronically documented.
Vaccine Inventory	ability to enter current number of vaccine doses on-hand in physical storage	E	Yes	Physical inventory counts enterable for reconciliation against system records.
Vaccine Inventory	ability to track and manage doses for vaccines: on hand, administered, wasted, expired, ordered, recalled, returned, transferred	E	Yes	Full dose lifecycle tracking covers all transaction types in a unified inventory ledger.

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Vaccine Inventory	ability to enable removal of recalled lots from active inventory	E	Yes	Recalled lots removable from active inventory with automatic notification.
Vaccine Inventory	ability to print a reconciliation worksheet	O	Yes	Printable reconciliation worksheets generated for physical count verification.
Vaccine Transfers	ability for jurisdictional admin to approve vaccine transfers	O	Yes	Transfer approvals managed by jurisdictional admins.
Vaccine Transfers	ability for jurisdictional admin to initiate VFC vaccine transfers	O	Yes	Jurisdictional admins initiate VFC vaccine transfers between enrolled facilities.
Vaccine Transfers	ability to accept VFC vaccine transfers	O	Yes	Receiving facilities electronically accept incoming VFC vaccine transfers.
Vaccine Transfers	ability for jurisdictional admin to reject vaccine transfers	O	Yes	Transfer rejections managed with reason codes and notifications.
Vaccine Transfers	ability to search and view past vaccine transfers within a specified timeframe	O	Yes	Transfer history searchable by date range, source/destination facility, and vaccine type.
Vaccine Transfers	ability to allow for direct vaccine transfer between facilities without jurisdictional pre-approval but with jurisdictional visibility	O	Yes	Direct transfer workflows with visibility-only oversight configurable per jurisdictional policy.
Vaccine Wastage	ability to manage vaccine wastage	E	Yes	Vaccine wastage management captures event date, reason, vaccine, lot, quantity, and cost.
Vaccine Wastage	ability to determine the total cost of wasted vaccine by user-defined parameters	E	Yes	Wastage cost reports generated with user-defined parameter filtering.
Vaccine Wastage	ability for jurisdictional admin to modify inventory quantity to reflect wastage	E	Yes	Jurisdictional admins can modify inventory quantities to reflect reported wastage.
Vaccine Wastage	ability for jurisdictional admin to assign reason for inventory wastage	E	Yes	Wastage reason codes assigned from a configurable reason code list.
Vaccine Wastage	ability to determine the total doses of vaccine wasted by user-defined parameters	E	Yes	Dose-level wastage reporting supports user-defined filters.
Vaccine Expiration	ability to manage vaccine expiration	E	Yes	Vaccine expiration management tracks lot expiration dates, generates alerts, and removes expired lots.

Function: Manage Vaccine Inventory

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Vaccine Expiration	ability to alert users to vaccine nearing expiration	O	Yes	Configurable expiration alert thresholds notify users when lots approach expiration.
Vaccine Expiration	ability to provide alerts for inventory already expired	O	Yes	Expired lot alerts generated and displayed in the inventory management interface.
Vaccine Expiration	ability for jurisdictional admin to modify inventory quantity removed from available inventory	E	Yes	Jurisdictional admins can adjust inventory quantities to reflect expired lot removal.

Total: 87 | Essential: 68 | Optional: 19 | Yes: 86 | Yes w/Customization: 1 | No: 0

Function: Provide Data Access

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Standard Reports	ability to generate a report that includes history and forecast	E	Yes	Patient immunization history and vaccine forecast combined in a unified report.
Standard Reports	ability to generate a data quality report displaying information on the quality of submitted data	E	Yes	Data quality reports display completeness, timeliness, and validity metrics.
Standard Reports	ability to generate a report that provides information on patient and vaccine matching and deduplication	E	Yes	Matching and deduplication reports display merge activity and match rates.
Standard Reports	ability to generate a report that provides information on data quality of data at rest	E	Yes	Data-at-rest quality reports assess stored record completeness.
Standard Reports	ability to generate data quality reports for HL7 submissions	E	Yes	HL7 submission quality reports display error rates and data element completeness by submitter.
Standard Reports	ability to generate VFC reports	E	Yes	Full suite of VFC accountability and management reports available.
Standard Reports	ability to generate a practice-level patient data report for VFC enrolled sites	E	Yes	Practice-level patient data reports available for VFC enrolled sites.
Standard Reports	ability to generate a doses administered report for accountability for publicly-purchased vaccine	E	Yes	Publicly-purchased vaccine doses administered reports support VFC and state program accountability.
Standard Reports	ability to generate a doses administered report for VFC enrolled sites	E	Yes	VFC-specific doses administered reports available at site, county, and state levels.
Standard Reports	ability to generate VFC provider practice profiles	E	Yes	Provider practice profiles display VFC enrollment status, active clinicians, and order history.
Standard Reports	ability to generate a report showing the total number of select vaccines administered each month by facility	E	Yes	Monthly vaccine administration reports by facility available for all tracked antigens.
Standard Reports	ability to generate a report displaying a change in vaccine administration patterns over a selected timeframe	E	Yes	Administration pattern change reports display trend analysis over user-defined timeframes.
Standard Reports	ability to generate duplicate/merge record reports	E	Yes	Duplicate and merge activity reports display all merge transactions.
Standard Reports	ability to generate reports about IIS users	E	Yes	User activity reports display login history, data entry activity, and role assignments.

Function: Provide Data Access

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Standard Reports	ability to generate vaccine management reports	E	Yes	Vaccine management reports cover ordering, receiving, inventory reconciliation, and transfer activity.
Standard Reports	ability to generate a report listing patients who received a recalled vaccine	E	Yes	Vaccine recall patient identification reports display all patients who received vaccines from recalled lots.
Standard Reports	ability to generate a report of patients declining or refusing vaccinations	O	Yes	Vaccine refusal reports display patients with documented refusals.
Standard Reports	ability to generate a report to calculate a facility's average vaccine usage	O	Yes	Facility vaccine usage reports calculate average monthly usage rates.
Standard Reports	ability to generate VFC accountability reports for managing VFC inventories and orders	E	Yes	VFC accountability reports support federal and jurisdictional reporting requirements.
Standard Reports	ability to generate vaccine inventory reports	E	Yes	Inventory reports display current stock levels by vaccine, lot, facility, and funding source.
Standard Reports	ability to generate report(s) that display information about vaccine order history	O	Yes	Order history reports display all orders with status, quantities, and approval history.
Standard Reports	ability to generate report(s) that display information about vaccine wastage and returns	E	Yes	Wastage and return reports display quantities, reasons, costs, and lot-level details.
Standard Reports	ability to generate a report providing information about influenza pre-book orders	E	Yes	Influenza pre-book order reports support seasonal planning.
Standard Reports	ability to query vaccine ordering patterns over a selected timeframe	O	Yes	Ordering pattern trend analysis available.
Standard Reports	ability to generate reports that provide information about organizations and facilities	O	Yes	Organization and facility reports include enrollment status and program participation.
Standard Reports	ability for jurisdictional admin to generate report that lists immunizing facilities	O	Yes	Immunizing facility directories reportable with filtering by geography and status.
Standard Reports	ability to generate reports that provide information about students and their immunization status	E	Yes	Student immunization reports support school compliance verification.
Standard Reports	ability to generate report of student exemptions by type (medical, religious)	E	Yes	Student exemption reports disaggregate by exemption type.

Function: Provide Data Access

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Standard Reports	ability to generate a record of students' immunizations for school purposes	E	Yes	School immunization records printable in state-compliant formats.
Standard Reports	ability to generate exclusion letters stating which vaccines a student needs	E	Yes	School exclusion letters generated per student identifying vaccines needed.
Standard Reports	ability to generate reports for individuals vaccinated during a mass vaccination event	E	Yes	Mass vaccination event reports list all individuals vaccinated.
Standard Reports	ability to generate doses administered reports for priority groups during a public health emergency	E	Yes	Priority group doses administered reports support public health emergency response tracking.
Standard Reports	ability to generate a report that provides information about the status of the system	E	Yes	System status reports display uptime metrics, active users, and message volumes.
Ad Hoc Queries	ability to generate queries and reports based on user-defined parameters	E	Yes	Ad hoc query builder supports fully user-defined parameter sets.
Ad Hoc Queries	ability to schedule an ad hoc query to run on a predetermined interval	E	Yes	Ad hoc queries schedulable for automated execution at daily, weekly, or custom intervals.
Ad Hoc Queries	ability to generate reports with a user-defined report format	E	Yes	Report output format and layout configurable per query/report definition.
Ad Hoc Queries	ability to generate reports across geographic hierarchy levels	E	Yes	Reports aggregate data across geographic hierarchy levels.
Ad Hoc Queries	ability to generate data to inform the public via website dashboards or similar means	E	Yes	Public-facing dashboards and data visualizations supported.
Ad Hoc Queries	ability to store saved report templates	E	Yes	Report templates saved for reuse by individual users or shared across the organization.
Ad Hoc Queries	ability to modify saved report templates	E	Yes	Saved report templates editable with version history retention.
Ad Hoc Queries	ability to inactivate (archive) saved report templates	E	Yes	Report templates archived while preserving historical records.
Ad Hoc Queries	ability to modify a query	E	Yes	Existing queries editable with change history logging.

Function: Provide Data Access

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Ad Hoc Queries	ability to delete a query	E	Yes	Queries deletable by authorized users with confirmation prompts.
Ad Hoc Queries	ability to save an ad hoc query	E	Yes	Ad hoc queries saved for future reuse.
Ad Hoc Queries	ability to create a map using geocodes for statistical reporting	O	Yes	Geocode-based mapping available for geographic analysis and visualization.
Print/Export Reports	ability to export IIS data for use in other systems	E	Yes	IIS data exportable in multiple formats (CSV, XML, HL7, FHIR).
Print/Export Reports	ability to export data in user-defined formats	E	Yes	Export formats configurable per report.
Print/Export Reports	ability to export aggregate level de-identified data	E	Yes	Aggregate de-identified data exports support public health analysis and CDC reporting.
Print/Export Reports	ability to export record level de-identified data	E	Yes	Record-level de-identified exports available with configurable suppression of direct identifiers.
Print/Export Reports	ability to print reports	E	Yes	All reports printable directly from the browser interface.
Consumer Access	ability for authorized consumers to access personal IIS data per jurisdictional policy	E	Yes	Consumer portal provides authorized individuals access to their personal immunization records.
Consumer Access	ability for authorized consumer to print forecast	O	Yes	Vaccine forecast printable by authorized consumers.
Consumer Access	ability for authorized consumer to print patient immunization record	E	Yes	Immunization records printable by authorized consumers.
Consumer Access	ability for authorized consumer to print an official immunization history	E	Yes	Official immunization history documents printable with jurisdictional seal/signature.
Consumer Access	ability for authorized consumer to retrieve a verifiable digital vaccine credential	E	Yes	Verifiable digital vaccine credentials (SMART Health Cards) retrievable by authorized consumers.
Consumer Access	ability for authorized consumer to view immunization forecast	E	Yes	Immunization forecast viewable in the consumer portal.

Function: Provide Data Access

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Consumer Access	ability for authorized consumer to view patient information	E	Yes	Patient demographic information viewable by authorized consumers.
Consumer Access	ability for authorized consumer to view patient immunization record	E	Yes	Full immunization record history viewable by authorized consumers.
Consumer Access	ability for patient/patient representative to opt in for reminder/recall notifications	O	Yes	Patients/representatives can opt in to reminder/recall notifications.
Consumer Access	ability for patient/patient representative to opt out of reminder/recall notifications	O	Yes	Patients/representatives can opt out of reminder/recall notifications.

Total: 60 | Essential: 50 Optional: 10 | Yes: 60 Yes w/Customization: 0 No: 0

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If *Yes with customization*: indicate anticipated cost and timeline
Performance - Time Behavior	support a responsive user interface	E	Yes	BlueLot's web interface built on modern responsive frameworks with sub-second navigation response.
Performance - Time Behavior	support application launch in less than 10 seconds	E	Yes	Application launch under 10 seconds on standard broadband connections.
Performance - Time Behavior	support response to a user navigation action in less than 1 second	E	Yes	User navigation actions return responses in under 1 second.
Performance - Time Behavior	support response to process submitted information via direct data entry in less than 4 seconds	E	Yes	Data entry form submission processing completed in under 4 seconds under normal load.
Performance - Time Behavior	support generation of a standard, pre-configured report in less than 30 seconds	E	Yes	Standard report generation optimized to complete within 30 seconds for typical data volumes.
Performance - Time Behavior	support responsive data exchange system interfaces	E	Yes	All API and HL7 interfaces monitored for response time compliance.
Performance - Time Behavior	support electronic response to a submitted HL7 message in 5 seconds or less, 95% of the time	E	Yes	HL7 ACK response time monitored with a target of ≤5 seconds at the 95th percentile.
Performance - Capacity	support up to 1000 concurrent users without performance degradation	E	Yes	BlueLot infrastructure auto-scales to support 1,000+ concurrent users.
Performance - Capacity	support multiple users viewing the same data at the same time	E	Yes	Read-optimized data access supports concurrent multi-user viewing.
Performance - Capacity	support users using the same function at the same time without degrading performance	E	Yes	Function-level concurrency managed through connection pooling and caching.
Performance - Resource	support resource-intensive tasks without degrading IIS performance	E	Yes	Resource-intensive tasks processed asynchronously to avoid UI performance impact.
Performance - Resource	support user queries via the user interface without degrading IIS performance	E	Yes	Query execution isolated from transactional processing.
Performance - Resource	support generation of ad hoc reports without degrading IIS performance	E	Yes	Ad hoc report generation runs on a separate reporting instance.
Performance - Resource	support data extracts without degrading IIS performance	E	Yes	Data extraction processes scheduled or run asynchronously.

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Performance - Capacity	support efficient processing of HL7 messages without performance degradation	E	Yes	HL7 message processing architecture handles high message volumes with auto-scaling.
Performance - Capacity	support processing of up to 200 HL7 VXU messages per hour	E	Yes	BlueLot processes 200+ HL7 VXU messages per hour. Load tested.
Performance - Capacity	support processing of up to 8000 HL7 QBP messages per hour	E	Yes	QBP query processing supports 8,000+ messages per hour.
Performance - Capacity	support permanent storage of records as per jurisdictional policy	E	Yes	Data retention policies configurable per jurisdictional requirements.
Performance - Capacity	support storage of unlimited number of organization records	E	Yes	Organization record storage unlimited on cloud infrastructure.
Performance - Capacity	support storage of unlimited number of user records	E	Yes	User record storage unlimited.
Performance - Capacity	support storage of unlimited number of patient records	E	Yes	Patient record storage unlimited — WV volume of 2.9M records well within platform capacity.
Performance - Capacity	support storage of unlimited number of patient immunization records	E	Yes	Immunization record storage unlimited — WV volume of 31.9M records supported at launch.
Usability - Accessibility	meet the United States Access Board Section 508 Standards	E	Yes	BlueLot developed per WCAG 2.1 AA standards, encompassing all Section 508 requirements.
Usability - Operability	support best practices for web application session management	E	Yes	Session management follows OWASP and NIST SP 800-63 recommendations.
Usability - Operability	ability to execute Boolean searches	E	Yes	Boolean search operators (AND, OR, NOT) supported in search interfaces.
Usability - Operability	ability to execute wildcard searches	E	Yes	Wildcard character searches supported for partial name and identifier matching.
Usability - User error	minimize data entry errors	E	Yes	Error minimization achieved through validation rules, pick-lists, auto-complete, and inline messaging.
Usability - User error	assist in entering data correctly via pick-lists, drop-down boxes, or other easy-to-use options	E	Yes	Pick-lists, drop-downs, and predictive text guide correct input throughout data entry interfaces.

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Usability - User error	indicate required fields for data entry	E	Yes	Required fields visually indicated with asterisks and color coding throughout all data entry forms.
Usability - User error	ability to provide alert when required fields are left blank	E	Yes	Inline alerts displayed when form submission attempted with unfilled required fields.
Usability - User error	support cross-field checks to ensure accuracy of information where dependencies exist	E	Yes	Cross-field validation rules enforce data consistency throughout the system.
Usability - User error	support spell check functionality with medical terminology for all free text fields	O	Yes with customization	Spell check with medical terminology dictionary configured for all free text fields. Est: 2 weeks.
Usability - User error	error messages must be fixed prior to continuing	E	Yes	Blocking validation errors prevent workflow continuation until corrected.
Usability - User interface	support alerts related to user interface response time	O	Yes	UI response time alerts displayed when operations exceed configurable thresholds.
Usability - User interface	support user feedback with a simple indicator for response times between 2-4 seconds	O	Yes	Progress indicators displayed for operations with 2-4 second response times.
Usability - User interface	support user feedback with percent-done indicator for long response times	O	Yes	Progress bars with estimated completion times displayed for long-running operations.
Usability - User interface	support users in stopping an operation expected to take longer than 10 seconds	O	Yes	Cancel buttons provided for all operations expected to take longer than 10 seconds.
Usability - User interface	support users in performing other tasks while waiting for the system to complete long tasks	O	Yes	Asynchronous processing allows users to continue other tasks while long operations complete.
Reliability - Availability	support availability of the system as per jurisdictional needs	E	Yes	BlueLot designed for 99.9%+ availability per SLA.
Reliability - Availability	support access to the web application 99.9% of the time	E	Yes	99.9% monthly uptime is the contractual SLA commitment.
Reliability - Availability	support processing of and response to HL7 messages 99.9% of the time	E	Yes	HL7 processing availability monitored separately with 99.9% uptime target.
Reliability - Recoverability	ability to backup the IIS data as per jurisdictional policy	E	Yes	Automated backups run on configurable schedule with encrypted off-site storage.

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Reliability - Recoverability	support redundancy of the IIS as per jurisdictional recovery plan	E	Yes	Multi-availability-zone redundancy provides geographic failover capability.
Reliability - Recoverability	support real-time failover	E	Yes	Automated failover to standby infrastructure occurs within minutes of a primary system failure.
Reliability - Recoverability	support the recovery of backed up data as needed	E	Yes	Backup data restoration tested quarterly with documented recovery time objectives.
Reliability - Recoverability	support the restoration of IIS data after an outage or loss	E	Yes	Data restoration procedures documented in BCP/DR plan with tested recovery time objectives.
Reliability - Fault tolerance	support the efficient roll back of software changes as needed	E	Yes	Software deployment pipeline supports automated rollback to prior stable version.
Security - Non-repudiation	support audit logs for security purposes	E	Yes	Comprehensive audit logs capture all user actions, data changes, and access events.
Security - Authenticity	ability to electronically notify the system administrator of unauthorized activity	E	Yes	Automated alerts notify system administrators of failed authentication and unauthorized access patterns.
Security - Authenticity	ability to track all attempted accesses that fail identification, authentication and authorization requirements	E	Yes	All failed access attempts logged with timestamp, user ID, IP address, and failure reason.
Security - Authenticity	ability to track all accesses that successfully comply with authentication and authorization	E	Yes	Successful access events logged with full session details for compliance audit.
Security - Non-repudiation	ability to maintain audit logs for specified time per jurisdictional policy	E	Yes	Audit log retention periods configurable per jurisdictional policy.
Security - Non-repudiation	ability for jurisdictional admin to search audit log by function performed	E	Yes	Audit log search supports filtering by function/action type.
Security - Non-repudiation	ability for jurisdictional admin to search audit log by date and time period	E	Yes	Audit logs searchable by date/time range.
Security - Non-repudiation	ability for jurisdictional admin to search audit log by date range	E	Yes	Date range filtering available for all audit log search interfaces.
Security - Non-repudiation	ability for jurisdictional admin to search audit log by user defined parameters	E	Yes	Custom parameter combinations supported in audit log search.

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Security - Non-repudiation	ability for jurisdictional admin to search audit log by patient identifiers	E	Yes	Patient-specific audit log search retrieves all access and modification events.
Security - Non-repudiation	ability for jurisdictional admin to filter audit log search by user defined parameters	O	Yes	Audit log results filterable by multiple user-defined parameters.
Security - Non-repudiation	ability for jurisdictional admin to sort audit log search results	O	Yes	Audit log search results sortable by date, user, action type, and patient identifier.
Security - Integrity	store audit data related to user access/viewing of patient records in the system	E	Yes	Patient record access events (view, query, export) captured in the audit log.
Security - Integrity	store date of user access to a patient record	E	Yes	Access event dates stored with ISO 8601 timestamp precision.
Security - Integrity	store time of user access to a patient record	E	Yes	Access event times stored with second-level precision.
Security - Integrity	store user ID of user access to a patient record	E	Yes	User IDs stored with each access event.
Security - Non-repudiation	store audit data related to data changes in the system	E	Yes	All data modification events captured with before/after values, user ID, and timestamp.
Security - Non-repudiation	store 'date received' for data modified in the system	E	Yes	Original receipt date stored for all data modification events.
Security - Non-repudiation	store 'time received' for data modified in the system	E	Yes	Receipt time stored with second-level precision.
Security - Non-repudiation	store 'date updated' for data modified in the system	E	Yes	Last update date stored and displayed for all modified records.
Security - Non-repudiation	store 'time updated' for data modified in the system	E	Yes	Last update time stored with second-level precision.
Security - Non-repudiation	store user associated with data modified in the system	E	Yes	Modifying user identity stored with each data change event.
Security - Integrity	automatically enforce session timeout for a user when idle period is reached	E	Yes	Session timeout automatically enforced with a warning prior to timeout.

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Security - Integrity	ability for automatic session timeout to be customized per jurisdictional policy	O	Yes	Session timeout intervals configurable by jurisdictional admin.
Security - Integrity	ability to notify the user the session will expire	O	Yes	Warning displayed to users before session timeout.
Security - Confidentiality	support masking of passwords as they are typed or entered into the user interface	E	Yes	All password entry fields mask characters with configurable show/hide toggle.
Security - Integrity	ability for system administrator to terminate user connections	E	Yes	System admins can forcibly terminate any active user session.
Security - Confidentiality	Safeguard electronic personally identifiable information by implementing appropriate technical best practices	E	Yes	PII safeguards include encryption, access controls, masking, and audit logging.
Security - Confidentiality	ability to encrypt personally identifiable information at rest	E	Yes	All PII and PHI encrypted at rest using AES-256 or FIPS 140-2/3 equivalent.
Security - Confidentiality	ability to decrypt personally identifiable information at rest	E	Yes	Authorized system components decrypt PII at rest with key management per FIPS standards.
Security - Confidentiality	ability to encrypt personally identifiable information during transmission	E	Yes	All data in transit encrypted using TLS 1.2/1.3 per NIST SP 800-52 guidance.
Security - Confidentiality	ability to decrypt personally identifiable information during transmission	E	Yes	Authorized endpoints decrypt transmitted PII with certificate-based authentication.
Security - Integrity	ability to maintain firewalls per AIRA's Security Guidance Considerations for IIS	E	Yes	Firewall configurations maintained per AIRA IIS Security Guidance Considerations.
Security - Integrity	ability to maintain firewalls for protection of the hosting network	E	Yes	Network-level firewalls protect the hosting infrastructure.
Security - Integrity	ability to maintain firewalls for protection of the hosting environment	E	Yes	Application-level firewalls (WAF) protect the hosting environment.
Security - Integrity	ability to electronically notify the system admin of unauthorized activity	E	Yes	SIEM integration provides automated alerting to system admins.
Security - Integrity	ability to support anti-virus protection at current critical patch levels in the hosting environment	E	Yes	Anti-virus/EDR software maintained at current patch levels across all hosting nodes.

Function: Non-Functional

Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If "Yes with customization": indicate anticipated cost and timeline
Maintainability - Analyzability	support event logging	E	Yes	Comprehensive event logging captures system, application, and database events.
Maintainability - Analyzability	ability for system admin to enable event logging on all servers	O	Yes	Event logging enableable/configurable by system admins per server and service.
Maintainability - Analyzability	ability for system admin to enable event logging on all devices	O	Yes	Device-level event logging configurable by system admins.
Maintainability - Analyzability	ability for system admin to disable event logging on all devices	O	Yes	Event logging selectively disableable with documented justification.
Maintainability - Analyzability	ability for system admin to limit access to event logs	O	Yes	Event log access controlled through role-based permissions.
Portability - Adaptability	support use of web browsers per jurisdictional policy	E	Yes	BlueLot supports all major browsers per jurisdictional browser policy.
Portability - Adaptability	support use of current version of web browsers	E	Yes	Current versions of Chrome, Firefox, Edge, and Safari fully supported.
Portability - Adaptability	support use of last prior version of web browsers	E	Yes	Immediately prior version of each major browser supported.
Portability - Adaptability	support a responsive design that renders properly on multiple devices	E	Yes	BlueLot uses responsive design rendering correctly on desktop, laptop, tablet, and smartphone.
Portability - Adaptability	support web client use on a desktop	E	Yes	Full feature functionality available on desktop computers.
Portability - Adaptability	support web client use on a laptop	E	Yes	Full feature functionality available on laptops.
Portability - Adaptability	support web client use on a tablet	E	Yes	BlueLot's responsive design provides full functionality on tablet devices.
Portability - Adaptability	support web client use on a smartphone	E	Yes	Core workflows accessible on smartphones.
Portability - Installability	be containerized (e.g., Docker or Kubernetes) to support easy installation and system updates	E	Yes	BlueLot containerized using Docker/Kubernetes for rapid deployment and horizontal scaling.

Function: Non-Functional				
Capability/Attribute	Requirement (IIS must/should have...)	Priority (E/O)	Vendor Response (Yes / Yes with customization / No)	Vendor Comment(s) If 'Yes with customization': indicate anticipated cost and timeline
Portability - Installability	be containerized for cloud based environments	O	Yes	Container images optimized for deployment on FedRAMP-authorized cloud infrastructure.
Total: 99 Essential: 84 Optional: 15 Yes: 98 Yes w/Customization: 1 No: 0				

VENDOR ATTESTATION & CERTIFICATIONS

Solicitation No.: CRFP 0506 MIS2600000002

Vendor: BenchLab LLC

Solution: BlueLot Intelligence Platform

Date: June 4, 2026

The undersigned authorized representative of BenchLab LLC hereby makes the following attestations and certifications in connection with the above-referenced solicitation. Each attestation is made under penalty of applicable state and federal law governing false or fraudulent statements in connection with procurement.

#	Attestation / Certification	Statement
1.	FedRAMP Moderate/High Authorization	BenchLab LLC hereby attests that BlueLot is hosted on FedRAMP-authorized cloud infrastructure meeting FedRAMP Moderate/High impact level requirements. Proof of authorization will be provided at contract execution and maintained throughout the contract term per deliverable 4.2.3.12.5.
2.	FIPS 140-2/3 Validated Cryptography	BenchLab LLC hereby attests that all data encryption at rest and in transit within BlueLot utilizes FIPS 140-2/3 validated cryptographic modules. Documentation of validated modules will be provided at contract execution and updated within 12 months of new NIST/CDC publications per deliverable 4.2.3.12.1.1.
3.	NIST SP 800-52 TLS Compliance	BenchLab LLC hereby attests that TLS configuration across all BlueLot system interfaces, HL7 transport, and user sessions conforms to NIST SP 800-52 guidance. Configuration documentation will be provided at contract execution and updated within 12 months of NIST revisions per deliverable 4.2.3.12.2.
4.	SOC 2 Type II	BenchLab LLC hereby attests that it undergoes annual SOC 2 Type II audits covering the Trust Services Criteria applicable to BlueLot's hosting, availability, security, and confidentiality controls. The current SOC 2 Type II report will be provided within 60 days of contract execution per deliverable 4.2.3.12.7.
5.	U.S. Data Residency	BenchLab LLC hereby attests that all data associated with the West Virginia IIS — including production data, read replica, backup, and archive — will be stored exclusively within U.S.-based data centers located within the continental United States. No data will be processed, stored, or accessed by personnel outside the United States per deliverable 4.2.3.5 and Attachment K.
6.	HIPAA Business Associate Addendum	BenchLab LLC hereby agrees to execute the HIPAA Business Associate Addendum (Attachment J) at contract execution and to fulfill all obligations of the Business Associate as defined therein under HIPAA, the HITECH Act, and all applicable regulations at 45 CFR Parts 160 and 164.
7.	Data Protection Addendum	BenchLab LLC hereby agrees to execute the Data Protection Addendum (Attachment K, Version 02.26.2026) at contract execution. All provisions — including encryption standards, data ownership, U.S. data residency, personnel location controls, background checks, security logs, and breach notification requirements — are accepted without exception or modification.
8.	OMIS Vendor/Contractor Background Checks	BenchLab LLC hereby attests that all company personnel assigned to this contract who will access, process, or store sensitive or confidential data (including PHI, PII, FTI, SSA, or PCI data) will complete fingerprint-based state and federal background checks through IdentoGo (WV Division of

Protective Services, Service Code: 228NXJ) in accordance with OMIS Policy #0529 (Attachment D) and Procedure OP-35-A (Attachment F) prior to receiving access to any State systems or data.

9. OMIS Incident Response Plan Alignment

BenchLab LLC hereby attests that its Incident Response Policy and Plan is aligned with NIST SP 800-61 and the OMIS Incident Reporting and Response Procedure (OP-30, Attachment G) and the OMIS Incident Management Plan (IM-01, Attachment I). Confirmed security incidents will be reported to the Agency within 24 hours of discovery per these requirements. Annual incident response exercises will be conducted and documented.

10. AIRA Security Guidance

BenchLab LLC hereby attests that BlueLot's firewall configurations and security controls are maintained per AIRA's Security Guidance Considerations for Immunization Information Systems, and that all network and application-level security controls align with these industry standards.

11. Federal Funds Procurement Extension

BenchLab LLC hereby agrees to extend the resulting contract to federal funds procurement requirements under the Federal Funds Addendum (2 C.F.R. §§ 200.317–200.327) and agrees to execute the Required Contract Provisions for Non-Federal Entity Contracts Under Federal Awards (2 C.F.R. § 200.317) as an addendum to any contract awarded pursuant to this solicitation.

12. Proposal Accuracy and Good Faith

BenchLab LLC hereby certifies that all information contained in this proposal package — including the Technical Proposal, Attachment A Cost Sheet, Attachment B RTM, and this Certifications document — is accurate, complete, and truthful to the best of the undersigned's knowledge and belief, and is submitted in good faith without fraud, collusion, or deception.

Patrick Barber

President / Authorized Signatory

BenchLab LLC

Middletown, Maryland

Date: _____

 06/01/20

Anthony Forte

Director of Operations

BenchLab LLC

Date: 06/01/20

FEDERAL FUNDS ADDENDUM — VENDOR AGREEMENT

Solicitation No.: CRFP 0506 MIS2600000002

Addendum Reference: Federal Funds Addendum, 2 C.F.R. §§ 200.317–200.327

Vendor: BenchLab LLC

Date: June 4, 2026

VENDOR AGREEMENT TO EXTEND CONTRACT TO FEDERAL FUNDS PROCUREMENT

In accordance with the Federal Funds Addendum issued as part of CRFP 0506 MIS2600000002, BenchLab LLC hereby agrees to the following:

1. Extension to Federal Funds Procurement

BenchLab LLC agrees to extend any contract awarded pursuant to this solicitation to procurements utilizing federal funds, consistent with the requirements of 2 C.F.R. §§ 200.317 through 200.327.

2. Required Contract Provisions

BenchLab LLC agrees to execute the "Required Contract Provisions for Non-Federal Entity Contracts Under Federal Awards (2 C.F.R. § 200.317)" as an addendum to any contract resulting from this solicitation, incorporating all mandatory federal contract clauses required for expenditure of federal funds.

3. State-Level and County/Local-Level Procurement

BenchLab LLC acknowledges that this solicitation constitutes two separate procurement tracks — one for standard state procurement and one for county/local federal funds procurement — and agrees to extend its contract to both tracks, to the extent applicable.

4. Compliance with Federal Regulations

BenchLab LLC certifies that it will comply with all applicable federal regulations governing the expenditure of federal funds, including without limitation: 2 C.F.R. Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards); applicable OMB circulars; Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352); Debarment and Suspension (E.O. 12549 and 12689); and Drug-Free Workplace Act of 1988 (41 U.S.C. §§ 8101–8106).

5. Debarment and Suspension Certification

BenchLab LLC certifies, to the best of its knowledge and belief, that neither BenchLab LLC nor any of its principals or affiliates: (a) are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency; (b) have been convicted within the preceding three-year period of, or had a civil judgment rendered against them for, commission of fraud or a criminal offense in connection with any public contract or transaction; (c) are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any such offense; or (d) have had one or more public transactions terminated within the preceding three-year period for cause or default.

6. Prohibition on Lobbying

No federal appropriated funds have been paid or will be paid, by or on behalf of BenchLab LLC, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, or any other federal action. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence such officials, BenchLab LLC shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

7. Equal Opportunity

BenchLab LLC agrees to comply with Executive Order 11246 (Equal Employment Opportunity), as amended by Executive Order 11375, and the regulations at 41 C.F.R. Part 60, in the performance of any contract resulting from this solicitation where applicable thresholds are met.

ACKNOWLEDGMENT AND AGREEMENT

By signing below, the authorized representative of BenchLab LLC acknowledges that they have read and understand the Federal Funds Addendum and all applicable federal requirements, and that BenchLab LLC agrees to be bound by and comply with all requirements set forth therein in connection with any contract resulting from CRFP 0506 MIS2600000002.

Patrick Barber
President / Authorized Signatory
BenchLab LLC
Middletown, Maryland
[Phone] | [Email]
Date: _____

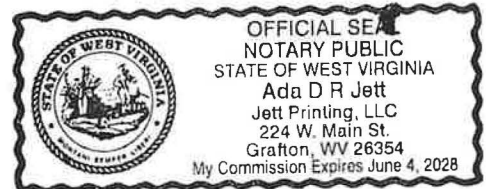
Anthony Forte
Director of Operations
As of 06-01-26

STATE OF WEST VIRGINIA ACKNOWLEDGMENT

State of West Virginia, County of Taylor

Subscribed and sworn to before me this 1 day of June, 2026.

Ada D R Jett



Notary Public

My Commission Expires: _____

STAFF BACKGROUND CHECK ACKNOWLEDGMENT

Solicitation No.: CRFP 0506 MIS2600000002

Reference: OMIS Policy #0529 (Attachment D), Procedure OP-35-A (Attachment F)

IdentoGo Service Code: 228NXJ

Vendor: BenchLab LLC

Date: June 4, 2026

BenchLab LLC acknowledges and agrees to the following requirements governing background checks for all personnel assigned to this contract who will access, or may potentially access, sensitive or confidential data (including PHI, PII, FTI, SSA data, and/or PCI data) in connection with the West Virginia Immunization Information System:

1. All BenchLab LLC personnel assigned to this contract who will access State systems, facilities, or sensitive data will complete fingerprint-based state and federal background checks through IdentoGo, using WV Division of Protective Services Service Code: 228NXJ, prior to receiving access to any State systems or data.
2. Background check results will be submitted to and stored by the WV Division of Protective Services (DPS). BenchLab LLC acknowledges that any unfavorable background check results will only be shared with the individual concerned in accordance with federal law.
3. BenchLab LLC will ensure compliance with all background check requirements for any subcontractors or sub-consultants whose personnel will access State systems or sensitive data.
4. BenchLab LLC will maintain records of completed background checks and provide verification to the Agency upon request.
5. New personnel assigned to this contract after initial award will complete required background checks before receiving access to State systems or data.
6. BenchLab LLC acknowledges that violation of this policy may result in termination of the contractual relationship and/or associated privileges, and may result in civil and criminal penalties as determined by federal and state laws and regulations.

Current BenchLab LLC personnel who will be assigned to this contract and require background checks:

Name	Title / Role on Contract	Background Check Status	Date Cleared
Patrick Barber	President / Executive Sponsor	<i>Pending — Prior to Contract Execution</i>	_____
Anthony Forte	Director of Operations / Project Manager	<i>Pending — Prior to Contract Execution</i>	_____
Alex Bodine	Development & Technical Security Lead	<i>Pending — Prior to Contract Execution</i>	_____

[Additional Staff — TBD]

*Pending — Prior to
Contract Execution*

Patrick Barber

President / Authorized Signatory

BenchLab LLC

BenchLab LLC

Middletown, Maryland

Date: _____