COLUMN

Dear West Virginia Health & Human Resources,

We greatly appreciate being allowed to participate in your RFP. We thank you for your serious consideration.

Sincerely,

Tim [illegible]

Corporate Office
1011 State Street, Suite 140
Lemont Il 60439

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Case Management

CASE INVESTIGATION FOR OIG

Addressing the need of OIG Organizations

The Challenge

The mainstream news is inundated with cases of fraud, mismanagement, and manual-prone errors in record keeping and reporting in cities and governments across the United States. The ever growing expansions of technologies have produced large amounts of information silos, creating challenges in tying data together and reporting accuracy. Office of Inspectors General are tasked with the responsibility to answer to their constituents and ensure accountability at all levels.

The Solutions: Column Case Investigative for OIG

Column Case offers a collaborative, integrated, web-based solution that helps organizations securely log, store, and share information and records. Focused on the real-world needs of professionals. The Column Case Investigative offers the collaboration, content management, workflow automation, and integration features you need to improve case management.

Individually, Column Case Investigative allows distributed teams access to highly secure, case-specific workspaces. Collectively, Column Case Investigative promotes secure, cross-agency cooperation and information sharing that helps improve outcome while reducing costs.

Case Management Benefits

Column Case Investigative for OIG can help your organization:

Enhance Information Sharing

The investigative module replaces paper-based case folders with secure, case-specific virtual workspaces. Here, user can coordinate their work and manage unstructured content such as Microsoft Office and PDF documents, HTML files, e-mail messages, images, forms – even audio and video files.

Key Benefits

- Optimize user productivity with a modern intuitive web interface and role-based navigation.
- Enhance information sharing with highly secure, case-specific workspaces that allow almost any file format.
- Protect sensitive information using a variety of highly-flexible user, role, and information-based security controls
- Increase efficiency with the leading workflow engine that automates activities and enforces processes.
- Improve information access with a search engine that indexes web pages, forms, attachments, form letters, and log entries and a data visualization tool.
- The link analysis feature allows cases, people and properties to be linked by data visualization.

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Column Case Management response to:

West Virginia Health and Human Resources

CRFP 0513 OIG2600000001

Response Due Date:
January 6th, 2026

Tim Yario

Point of Contact

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Section 1 – Executive Summary

To: West Virginia Health and Human Resources
Regarding: CRFP 0513 OIG2600000001

Dec 30th, 2025

Column Case Management is pleased to submit this technical proposal in response to the West Virginia Health and Human Resources's solicitation for a secure, cloud-based Investigations and Fraud Case Management System. Column has done a lot of work in the healthcare space over the past two years, with a few state agencies providing us with both consulting and software expertise. For example, we are currently working with the Texas Department of Health and Human Services on Healthcare malpractice, Medicaid, and Food Stamp fraud for their OIG. When they go live this summer, they will have about 300 concurrent users. This agency has been very collaborative with us over the past year, making suggestions that have made our product geared towards these types of investigations. Many of their suggestions were in our August release, and a few more will be introduced in our March release.

The Texas enhancements have added to the current out-of-the-box application that provides end-to-end support for the investigative lifecycle, including intake, investigation tracking, evidence and document management, task assignment, reporting, and case disposition. The platform is designed for configuration rather than customization, enabling agencies to adapt workflows, forms, and reporting to their operational needs while maintaining long-term maintainability and system integrity.

Column anticipates that most of the WV OIG's requirements can be met through system configuration and standard reporting capabilities. Since there are no integrations and legacy data migrations, the proposed approach emphasizes rapid deployment, minimized operational disruption, and alignment with established investigative best practices. Where functionality is not provided out of the box, Column's configuration framework allows for controlled enhancements without introducing unnecessary customization risk.

Column's solution will be delivered as a secure Software-as-a-Service (SaaS) platform hosted in an environment that is FedRAMP High. The system is designed to align with the security, privacy, and regulatory requirements applicable to investigative and oversight agencies, including CJIS-aligned controls and HIPAA/HITECH support. Detailed security and compliance responses are provided within Column's RFP response and supporting compliance documentation.

Column appreciates the opportunity to support the West Virginia Office of Inspector General and looks forward to partnering with WV OIG to deliver a secure, scalable, and effective investigative case management solution. We are confident today that our product is becoming a leader in this space. Thank you again for allowing us to participate.

Sincerely,

Tim Yario
Managing Director
708-408-7715

Section 2 – Project Goals & Implementation Approach

The primary goal of this project is to implement a secure, cloud-based Investigations and Fraud Case Management System that supports the West Virginia Office of Inspector General's end-to-end investigative lifecycle, including intake, investigation tracking, evidence management, reporting, and case disposition. Column's approach focuses on delivering a configurable solution that aligns with WV Health and Human Resources operational needs while minimizing implementation risk and long-term maintenance overhead.

Column will execute the implementation using a phased approach designed to promote transparency, stakeholder engagement, and predictable delivery. The implementation will begin with project initiation and requirements validation to confirm workflow configurations, user roles, and reporting expectations. This phase will be followed by system configuration, testing, and preparation for production deployment. Training for administrators and end users will be conducted to support system adoption and operational readiness.

The implementation emphasizes configuration over customization, leveraging standard system capabilities wherever possible to meet WV OIG requirements. This approach enables efficient deployment while preserving flexibility for future changes without introducing unnecessary technical complexity.

Ongoing communication and project governance will be maintained throughout the implementation to ensure alignment with project objectives, manage risks, and address issues in a timely manner. Column will work closely with WV OIG to coordinate schedules, validate deliverables, and support a smooth transition to system go-live.

A detailed description of the implementation activities, roles and responsibilities, assumptions, and level of effort is provided in the attached Statement of Work, which forms the basis for implementation planning and cost estimation.

Section 3 – System Overview & Functional Capabilities

The Column Case Management System is a configurable, workflow-driven case management platform designed to support the full lifecycle of investigative and fraud-related cases. The system provides a centralized environment for managing case information, investigative activities, evidence, and reporting while maintaining security, auditability, and operational consistency.

Case Lifecycle Management

The system supports end-to-end case management from intake through investigation, resolution, and closure. Authorized users can create, update, and track cases using configurable workflows that reflect investigative processes and approval requirements. Case records consolidate related information, including notes, tasks, documents, and status history, to provide a complete view of investigative activity.

Intake and Investigation Workflows

Column supports internal case initiation and structured intake processes to ensure consistent data capture and routing. Investigative workflows may be configured to reflect WV OIG processes, including task assignments, status changes, and internal reviews. Workflow automation supports timely progression of cases while maintaining visibility into workload and case status.

Evidence and Document Management

The system provides secure document and evidence management capabilities to support investigative needs. Users may upload, store, and associate documents and evidence with cases while maintaining access controls and audit history. Evidence handling supports traceability and accountability throughout the investigative process.

Task Management and Collaboration

Column enables task assignment and tracking to support collaboration among investigators and supervisors. Tasks may be associated with cases, assigned to specific users or roles, and monitored to ensure accountability and timely completion. Role-based access controls ensure that users view and act upon information appropriate to their responsibilities.

Reporting and Dashboards

The system includes standard and configurable reporting capabilities to support operational oversight and analysis. Users can generate reports and dashboards based on case data, investigative activity, and system metrics. Reports may be exported in common formats to support internal review, audit, and management needs.

Configuration and Extensibility

The Column platform is designed to support configuration rather than customization. Forms, workflows, fields, and reports can be configured to align with agency processes without modifying core system code. This approach enables flexibility while supporting long-term maintainability and controlled system evolution.

Section 4 – Security, Hosting, and Compliance Alignment

The Column Case Management System is delivered as a secure, cloud-based Software-as-a-Service (SaaS) solution hosted within an AWS environment that meets the FedRAMP High security baseline. The hosting architecture leverages AWS services deployed within U.S.-based regions and is designed to support the confidentiality, integrity, and availability requirements of investigative and oversight agencies.

Column follows CJIS-aligned security principles throughout its product development and operational practices. This approach translates operationally into controls and processes designed to protect sensitive investigative information and ensure accountability across system access and usage.

Specifically, the Column Case Management System operationalizes CJIS-aligned requirements through the following measures:

- Adherence to documented security policies governing system access, data handling, and operational procedures.
- Strong user authentication mechanisms, including support for multi-factor authentication, to ensure that access to the system is restricted to authorized users.
- Encryption of sensitive data both in transit and at rest to protect against unauthorized access.
- Regular security audits and vulnerability assessments to identify and address potential risks within the application and supporting infrastructure.
- Ongoing security awareness and best-practice training to support user understanding of security and compliance responsibilities.
- Maintenance of detailed audit logs capturing access to and modifications of sensitive information to support traceability and accountability.

The AWS FedRAMP High–aligned hosting environment provides additional layers of security, including continuous monitoring, incident detection, and infrastructure-level protections aligned with NIST SP 800-53 requirements. These controls are integrated into Column's service delivery model to support applicable security and regulatory obligations.

Column's security and compliance approach is embedded within its platform architecture and operational processes and is designed to support the requirements of regulated investigative environments without requiring agency-specific customization.

Section 5 – Reporting & Analytics

The Column Case Management System provides reporting and analytical capabilities designed to support investigative oversight, operational monitoring, and management review. Reporting functionality is integrated directly into the platform and leverages configurable data structures to reflect case activity, investigative progress, and workload metrics.

Standard and Ad Hoc Reporting

The system includes standard reports that present commonly used investigative and operational information, such as case status, assignment activity, and disposition outcomes. In addition to standard reports, authorized users may generate ad hoc reports by selecting defined data elements and applying filters to address specific analytical needs without requiring custom development.

Dashboards and Operational Visibility

Column provides dashboard views that surface key metrics related to case volume, investigative status, and workload distribution. Dashboards are configurable to support different user roles and provide near real-time visibility into operational activity, enabling supervisors and managers to monitor trends and prioritize resources.

Report Output and Export

Reports generated within the system may be exported in commonly used formats, including Word, PDF, and Excel, to support internal review, audit, and management reporting needs. Exported reports are designed to allow further editing outside the system, enabling agencies to finalize narratives or formatting as required for internal or external use.

Data Access and Controls

Reporting access is governed by role-based permissions to ensure users can only view data appropriate to their responsibilities. Data presented in reports and dashboards reflects the same access controls applied throughout the application, supporting consistent handling of sensitive investigative information.

Configuration and Extensibility

Reporting capabilities are designed to be configuration-driven. As investigative processes or data requirements evolve, reports and dashboards can be adjusted by authorized administrators to reflect updated fields, workflows, or organizational structures without requiring system customization.

Section 6 – Training & Change Enablement

Column's training and change enablement approach is designed to support effective system adoption and operational readiness for WV OIG users. Training activities focus on equipping administrators and end users with the knowledge required to perform their roles within the system while minimizing disruption to ongoing investigative operations.

Training will be delivered using a combination of instructor-led sessions and reusable training materials tailored to the configured system. Separate training sessions will be conducted for system administrators and end users to ensure that each audience receives role-appropriate instruction. Training materials may include presentation content, demonstrations, and reference documentation to support continued learning following system deployment.

Change enablement is supported through early engagement with stakeholders during implementation, clear communication of system capabilities, and structured knowledge transfer. This approach helps ensure that users understand how system workflows align with established investigative processes and supports a smooth transition to operational use.

Detailed training activities, delivery methods, roles and responsibilities, and level of effort are defined in the attached Statement of Work, which governs the scope and execution of training and change enablement services.

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Section 7 – Support, Maintenance, and Managed Services

Column offers a managed services model to support the ongoing operation, maintenance, and administration of the Case Management System following deployment. Managed services are designed to augment WV OIG's internal capabilities by providing application expertise, operational support, and structured service delivery throughout the contract term.

Under the managed services model, Column provides remote application support, maintenance, and technical assistance for the in-scope Case Management System environment. Services include incident and issue management, application administration support, release and change coordination, and ongoing operational oversight. Managed services are delivered by a dedicated Column team with experience supporting investigative case management environments.

Maintenance activities include routine system updates and platform upkeep aligned with Column's standard product lifecycle. Technical assistance supports day-to-day system use, configuration questions, and issue resolution, with requests managed through defined support channels to ensure appropriate prioritization and tracking.

Managed services also include structured service delivery reviews and ongoing engagement to monitor system performance, review service activity, and identify opportunities for optimization. Where appropriate, limited application enhancements may be performed within the scope of the managed services offering, subject to defined service parameters.

Pricing, service scope, service levels, roles and responsibilities, and operational assumptions associated with Column's managed services offering are detailed in the attached Managed Services document, which governs the delivery of these services if selected by WV OIG.

Section 8 – Qualifications & Relevant Experience

We have spent the last 6 years focused on making the best investigative case software in the industry. With our submission/intake portal, workflow engine, search engine, link analysis module and reporting module, and with our 9 X release in October of 2025, we think we have achieved our mark. With that said, 95% of our clients are in state and local government with an investigative function. We currently have 11 active projects in 9 different states. Within those states, we are managing a wide range of investigations from missing women and HR investigations to employment, insurance, and Medicaid fraud. Some agencies have over 200 distinct workflows and over 200 reports.

Our client base is growing and continuously providing feedback on how we can improve the investigator's experience. With that said, we have focused heavily on reducing the number of clicks and making it easier to search and keep an investigator organized.

Most importantly, the latest version of Column Case Management was designed to have 90% of investigative best practices out of the box. The application is built for configuration, not for customization, which makes it easier for Column to maintain and provides our clients with their desired look and feel.

Some Column Case Users include, but are not limited to:

- Chicago Fire Department Internal Affairs and Labor
- Cook County Office of Independent Inspector General
- Colorado Department of Labor and Employment
- Florida Agency for Health Care Administration
- Illinois Office of Executive Inspector General
- Kentucky Juvenile Justice Administration
- Ohio Office of Inspector General
- Ramsey County Compliance & Ethics Office
- Texas State Auditor's Office
- Texas Workforce Commission
- Texas Health and Human Services

Additionally, our senior resources have a lot of industry expertise, which helps shape a positive outcome for our customers. To reiterate, Column's experience includes deploying, supporting inspector general compliance and accountability, and assisting in oversight in regulated public-sector environments.

Section 9 – References

Colorado Department of Labor & Employment - Investigations & Criminal Enforcement
Michelle Lucas – Criminal Investigator
Phone: 303-720-3916
E-mail: michelle.lucas@state.co.us

Jefferson Parish Office of the Inspector General
Kim Raines Chatelain – Inspector General
Phone: 504-736-8962 Ext. 222
E-mail: kchatelain@jpoig.net

Ohio Office of the Inspector General
Eric J. McKinniss – IT Administrator
Phone: 614-644-5291
E-mail: Eric.McKinniss@oig.ohio.gov

Texas Health and Human Services Office of the Inspector General
Evan Kelley – Senior Project Manager
Phone: 512-317-0245
E-mail: evan.kelley@hhs.texas.gov

Section 10 – Assumptions & Dependencies

The proposed solution and associated scope are based on the following assumptions and dependencies, which are intended to support timely implementation and effective system operation:

- The initial deployment will support approximately thirty-five (35) authorized users.
- No legacy data migration is included as part of the initial implementation unless authorized through a mutually agreed change request.
- No third-party system integrations are included at go-live; the system will be configured to support future integrations if required.
- The solution will be delivered as a cloud-based SaaS offering hosted in an environment aligned with FedRAMP High requirements.
- WV Health and Human Resources will designate appropriate points of contact empowered to provide decisions, approvals, and access required to support implementation and ongoing operations.
- WV Health and Human Resources will provide timely review and feedback on deliverables, configurations, and training activities to support project schedules.
- Any changes to scope, user counts, or service requirements will be managed through the applicable change management process.

Section 11 – Attachments

The following documents are included with this proposal and are incorporated by reference for informational purposes:

- **Statement of Work (SOW)** – Describes the proposed implementation approach, scope, roles and responsibilities, assumptions, and level of effort associated with deployment of the Case Management System.
- **Managed Services Contract** – Describes the optional managed services offering, including scope of services, service delivery approach, and associated pricing for ongoing support, maintenance, and application administration services.

These attachments are intended to supplement the technical proposal by providing additional detail regarding implementation and operational support and do not modify or supersede the requirements or terms of the solicitation.

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Case Management

WEST VIRGINIA HEALTH AND HUMAN RESOURCES (WV HHR)

STATEMENT OF WORK

COLUMN CASE MANAGEMENT, INC.
December 30, 2025

Document Information

Authorization

CREATED BY:	Fred Greifzu
AUTHORIZED ON:	12.30.2025

Version Control

Date	Author	Version	Change Reference
12.30.2025	Fred Greifzu	1.0	Document Creation

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Overview

West Virginia Office of Health and Human Resources ("Client" or "WV HHR") has requested a response to an open Request for Proposals (RFP). In response, Column Case Management has put together an implementation statement of work (SOW). Column is responding with its 9.x application, which was released in August 2025. With that said, Column has performed a significant amount of work with state agencies around Healthcare over the past two years. The 9.x release has specific use cases around financial calculations for recovery. Also, there is a lot more information displayed on one screen, which eliminates the amount of clicking and or navigating an investigator must perform. The Column portal also allows recipients and providers to submit and follow cases. These additional features allow Column to be a more collaborative tool, helping organizations manage and track responses to events, requests, and inquiries. Column enables users to manage and share information, automate tasks and processes, and collaborate across departments safely and securely. Easy to implement and maintain, CCM increases service quality and the overall investigator experience. In summary, the Column Case Management System will be delivered as a secure, cloud-based SaaS solution hosted within a FedRAMP High–authorized cloud environment.

CCM is a web-based case solution addressing collaboration, content management, workflow automation, and integration features to improve organizational performance. It provides:

- ***Collaborative Case Management*** - A highly configurable solution for enabling business process management. Collaborative Case Management allows you to automate and document a case intake process, manage, organize, and access documents and data associated with cases, and then document all case activities from triage to resolution. Case management also differentiates between the intake processes (Incident) and the actual case allowing a more thorough triage and vetting process. Case Management also accommodates the different processes and requirements applicable to both individual complaint and systemic policy reviews / systemic with a role-based permissions model.
- ***Business Process Management*** – Case business process management allows organizations to efficiently and effectively automate processes. Automation capabilities include e-forms, e-mails, notifications, and more. These features are all handled through system configurations allowing the Client to administer and maintain changes in process themselves in the future.
- ***Integrations Platform*** –CCM supports numerous integration mechanisms to be able to query and bi-directionally integrate with core systems, such as Record Management Systems (Tiberon, Integraph, Sungard, etc.) The solution also provides for integration with authentication systems, such as LDAP, Ping, RSA, and Kerberos-based and SAML-based products.
- ***Business Intelligence*** - An integrated business intelligence platform allows an organization to think and act strategically by understanding and utilizing data. The application allows for creation of a broad range of reports and dashboards making every decision and informed one and includes scheduling and ad hoc reporting capabilities.
- ***Risk Management Module*** - allows users to quickly determine what cases have a high solvability/risk factor or have a high priority. It does this by allowing you to use predefined factors such as, "Is there evidence?", "Has the subject previous been involved in other complaints or cases?", "Is it a linked crime series?", "Did it involve organized crime?", or it allows you to define your own factors. These factors have points associated to them and can give each case an automated score and priority.
- ***Data Visualization*** – Column has a relationship engine that allows you to associate in a many to many fashion Intakes, Cases, People, Organizations, Locations, or Property. Data Visualizations allows you to see these relationships in a graphical manor. Users will be able to click around in this graphical interface to help them understand relationships they may have not noticed when viewing the in a text formal. Users will also have the ability to click on any of the objects to view the details. For example, a provider with multiple cases linked to ra provider facility.

Column Case Management System has been designed to be easily configurable to support any organization in need of tracking activities around people, property, etc. Since most of the information is completely data driven, administrators can make changes as needed and make them immediately available to new users.

This Statement of Work ("SOW") shall be governed by the attached Terms and Conditions OR MSA if applicable.

Column is committed to providing professional consulting services that meet or exceed Client expectations. To this end, Column employs structured engineering processes and standards based upon a proven project management approach that ensures quality product and service deliverables. This SOW is a vital component of the process that establishes Client requirements and mutual expectations.

Please review all of the material presented for your approval. Every effort has been made to produce a comprehensive document for you that will specify your business requirements, as well as the most effective methods to address those requirements. Feedback from you will help ensure that both parties incorporate any necessary modifications into the document prior to its mutual acceptance.

1 Project Scope

Column recommends that this project be divided into two phases. Phase 1 will be the Requirements Analysis and Phase 2 will be the Implementation. This SOW includes both phases.

Column will perform all services required to meet the deliverables as outlined in this SOW on a level-of-effort (i.e. time and material, non-fixed fee) basis.

1.1 In Scope

The following has been deemed "In Scope" for this effort:

- Phase 1 - Project Initiation
- Requirements Analysis and Design
    - Column Case Management Application Workshop
    - Client's Process Review
    - Case Foundation Data Workshop
    - Integration Workshop (Email, Authentication, others)
    - Reporting Workshop
    - Functional Requirements Review
- Phase 2 – Implementation
    - Case Management Configurations
    - Case Foundation Data
    - Initial Reporting Configurations (Up to 100 hours)
    - Testing
    - Training
    - Documentation and Knowledge Transfer
    - Production Rollout /Post Live Support

*No legacy data migration is included at initial go-live unless authorized via Change Request

1.2 Out of Scope

The following and any item not explicitly stated as in scope is deemed out of scope as related to this SOW.

- Application customization will not be performed in this SOW.
- Integrations to any 3rd party product not listed in this SOW
- Column is not responsible for defining and documenting Client Common Operating Processes, Standard Operating Procedures or any kind of work instruction.
- Response times, performance and third-party system testing is not considered in the scope.

2 Project Initiation

Column will work with the Client's Project Manager in setting expectations and objectives through the creation of a Project Initiation Document ("PID"). The PID identifies the direction and scope of the project. It also defines and controls the project objectives, resources and activities associated with the engagement.

In creation of the PID, the following will be defined:

- Project Team – the following roles and responsibilities will need to be filled:
    - Project Board (Column and Client)
    - Project Executive (overall responsibility and final decision maker)
    - Senior User (representative and decision maker for the User Community)
    - Senior Supplier (representative and decision maker for the Supplier of Services)
    - Project Assurance (ensure all facets of the project are being done and quality is being met)
    - Project Manager (responsible for the day to day activities of the project)
    - Team Managers (responsible for delivery of individual work packages assigned during product delivery)
    - Project Support (Column and Client individuals that help through different stages of the project, such as testing work packages)
- Business Case
    - Project Objectives
    - Project Scope
    - Project Deliverables
    - Project Constraints
    - Project Assumptions
    - Project Approach (implementation phases)
    - Project Tolerance and Controls
    - Estimated Costs and Budget
    - Quality Plan and Acceptance Criteria
    - Communication Plan
    - Initial Project Plan
    - Initial Risk Log
    - Critical Success Factors and Key Performance Indicators
- Create Workshop Agendas and Attendee Lists

In addition, any specific Client standards, policies, or requirements with regard to system testing, user acceptance testing, documentation, or review will be discussed at this time.

Client Participation

- Client will assign a Project Manager or Project Executive to work with the Column Project Manager.
- The Client Project Manager will review and approve the final PID.
- The Client will have performed PID review with Column Project Manager prior to the Column consultants arriving on-site.

3 Phase 1 – Requirements Analysis

3.1 Column Case Management System Sandbox

Column will provide a Column Case Management System 9.x sandbox environment (via the Column Cloud) which will be available for the duration of the Requirements Analysis phase and be used to facilitate the phase.

3.2 Column Case Management Application Workshop

Column will conduct Deep Dive Demos of the Column Case Management System. The purpose of the demos is to get the Client project teams familiar with the common usage of the Column Case Management System in preparation for the following sessions.

Using the sandbox environment, Column will lead the demos for the Client to get an understanding of the 'out of the box' features and functionality. At the end of the demos, Column will make sure each group has a login to the sandbox and the Client will have approximately one week to review the use cases and prepare for the Process Review, where any deviations to the out of the box processes will be revealed by the Client and discussed and documented by Column for inclusion into the application pending final approval.

3.2.1 Column Case Management Use Cases

Column will review the following Standard Column Case Management Use Cases:

- Create/Initiate an Intake from the Intake Console
- Assign an Intake to myself
- Assign an Intake to another user in my group
- Assign an Intake to another group
- Assign an Intake to another user not in my group
- Creating a Journal entry on an Intake
- Navigating the Document Library
- Sending an email from an Intake
- Moving an Intake to Draft Approval
- Moving an Intake to Recommendation
- Moving an Intake to Recommendation Approval
- Relating an existing Case to another Case
- Searching for an Intake
- Locking an Intake
- Unlocking an Intake
- Adding an Ad Hoc Task to an Intake
- Create/Initiate a Case Record from Case Console using a Solution
- Create/Initiate a Case Record from Case Console not using a Solution
- Assign a Case to myself
- Assign a Case to another user in my group
- Assign a Case to another group
- Assign a Case to another user not in my group
- Creating a Journal entry on a Case
- Updating an eForm on a Case
- Sending an email from a Case
- Moving a Case to Under Investigation
- Moving a Case to Under Review
- Moving a Case to Final Product
- Moving a Case to Press Release
- Relating an existing Case to another Case

- Searching for a Case
- Locking a Case
- Unlocking a Case
- Adding an Ad Hoc Task to a Case
- Viewing a Task from the Console
- Assign a Task to myself
- Assign a Task to another user in my group
- Assign a Task to another group
- Assign a Task to another user not in my group
- Creating a Journal entry on a Task
- Completing a Task
- Searching for a Task

3.2.2 Shared Use Cases

Column will review the following Shared Use Cases:

- Using the Calendar
- Approving an Intake/Case/eForm/Property

3.2.3 Reporting

Column will review the following Reporting Use Cases:

- Navigating the Reporting Console
- Interacting with 'out of the box' Reports
- How to create an ad-hoc Report
- Navigating the 'out of the box' Case Domain
- Review 'out of the box' Data-level Security

Client Participation

- Client will ensure the appropriate resources are available to participate in Deep Dive Demo and Use Case review.
- Applicable Client teams will review the application uses cases and be prepared to discuss the deviations based on requirements during the Breakout Sessions.

3.3 Customer Process Review

Column will review the Client's current processes. The goal of the Process Review is to review each Use Case covered to identify any configurations specific to Client processes and procedures. Column will go through the Use Cases after review by the Client to discuss any configurations that will need to be performed. At the conclusion of the Process Review, there will be a complete and agreed upon set of configurations. The following groups/units will participate in the process review:

- Team Members
- Client System Administrators

3.3.1 Group/Unit Sessions

During the Group/Unit Sessions, the following functionality will be determined and gathered based on the defined process:

- Field and form layouts
- Case Templates
- Approval Requirements
- Group and user roles and permissions
- State transition rules
- Auto-assignment criteria

- Workflow needs and/or adjustments
- Business rules (state transition rules, notifications and requirements)
- View layouts
- Milestone Dates

3.3.2 Reporting Breakout Session

Column and the Client will review existing Customer reports and determine which new reports will be deployed within the incoming Column Case Management solution. Configuration of standard and ad-hoc reports and dashboards based on WV OIG requirements identified during implementation workshops. The following will be discussed:

- Review Column Case Management out of the box reports
- Review existing client reports/New reporting requirements

Note: The reports build is limited to an initial 100 hours for Phase 2, therefore report development is limited and all reports identified may not be included. The requirements list will be reviewed and the final list for report development will be determined during the Functional Requirements Review Workshop.

Client Participants: Application Process Owners, Application Managers, Reporting Resources

3.4 General Workshops

3.4.1 Foundation Data Workshop

Column will host a working session exploring the Case Management data model and associated application dependencies. Column will guide the Client through the implications of adopting various foundation data models. Topics will include:

- General Configuration Data
  - Case Categorization Tiers
  - Units and Organizations
  - Case Workers
  - Case Unit Assignments
  - Location
  - Organization
  - People
  - Case Templates
  - Journal Templates
  - Sites
  - Permissions
- Case Solutions Configuration
  - Case Fulfillment Tasks
  - Journal Templates / Standard Notifications
- Identify the members of the Data Modeling Team who will participate in the data modeling reviews
- Determine how each of the foundation data structures will be used in the Client's environment
- Identify the person responsible for each data element
- Identify the format in which data will be provided and the mechanism for populating the system
- Set a deadline for the first cut of baseline data

Client Participants: Application Process Owners, Application Managers, Project Team

3.4.2 Integrations

Column will lead discussions with the Client in order to gather the requirements for the following integrations:

- LDAP/SSO (User Authentication)
- Email (Inbound and Outbound)
- Others Optional

Client Participants: Subject Matter Experts

3.5 Functional Requirements Review

After completion of the Requirements Analysis Phase workshops, Column will prepare a Functional Requirements Overview worksheet ("FRO") and review the list of all requirements captured during the workshops. Requirements will also be reviewed against the expected level of effort anticipated for Phase 2 – Implementation. Should there be any variances, the parties will evaluate the proper course of action and the approach will be adjusted or a Change Request may be applicable.

Column and Client will come to agreement as to which requirements will be considered in or out of scope. The in-scope items will then be detailed in the Functional Requirements Design Document ("FRD").

Client Participation

- Client will provide appropriate and applicable resources to participate in the Functional Requirements review.
- Client will meet with Column Project Manager to review and sign-off on the overview, completion, and acceptance of the Functional Requirements Document.
- The Functional Requirements Documentation may be reviewed for additional clarity and content by the Client one time, and then updated if necessary. Additional revisions of the documentation may require additional days to be added to the estimate using the Change Control Procedure.

4 Phase 2 - Implementation

4.1 Case Management Application Configurations

Column will configure the Case Management application as outlined and agreed to in the FRD. These application configurations will enable the Client specific process flows to function within the Case Management application. The configurations may include the following:

- Case Form
- Case Console
- Intake Form
- Intake Console
- Task Form
- People Form
- Organization Form
- Location Form
- Milestones
- Task Templates
- Journal Templates
- Approvals
- Custom Workflows
- Secure Online Complaint Portal
- Authentication
- Email for Inbound / Outbound Notifications

Client Participation

- Client will provide resources with skills and knowledge to test the configurations.

- Client will review the testing and verify functionality and business requirements are met and sign-off on their completeness.
- Client will provide SME resources for the LDAP and Email with skills and knowledge to test the LDAP and Email.

4.2 Integrations

The integrations will not be performed as part of the original scope of this project.

- Integration-ready architecture only
- All integrations will require a Separate Change Request or SOW

4.3 Reports

Column will provide up to one hundred and sixty (100) hours to assist the Client with updates to the Reporting domain to allow for Client specific reports to be run. Additional hours will require a change request if needed.

- Reports support export to Word, PDF, Excel
- Reports are editable post-export
- Dashboards are included as reports

Client Participation

- Client will provide resources with skills and participate with the reports build out.
- Client will provide resources to participate in the report demonstration.

4.4 Column Case Management Foundation Data Configurations

The Client's Case foundation data will be loaded. The following configuration data can include, but is not limited to the following:

- Case Categorization Tiers
- Units and Organizations
- Assignment and notification groups
- Assignment rules
- Location
- Organization
- People
- Case Templates
- Journal Templates
- Sites
- Permissions

Column will perform the following tasks:

- Review data spreadsheet with Client to ensure data elements are completed in the agreed format and to ensure completeness before the import begins.
- Import standard and Case configurations data.
- Data failing to load will be re-loaded one-time. Data failing to load after one-time will be the Client's responsibility unless the data failures are the result of Column's data definitions. If data failure is due to Client's data, Client will be given time to perform data clean up before re-loading the final time. If data failure is a result of Column's work, then Column is responsible for correcting and uploading.

Client Participation

- Client will provide configuration data worksheet for upload and work with Column to achieve full data loads.
- Client is to provide access to personnel who can make decisions regarding the topics outlined on the identified data sources.

- It is Client's responsibility for data integrity and completeness.
- Client is responsible for cleaning up data which fails to upload after the second load.
- Client will be responsible for completing the in-scope data mappings in the Column format. All in scope data will be presented in the same format and structure as outlined by Column.
- Client will review completed configurations and verify functionality and business requirements are met and sign-off on their completeness.

4.5 Legacy Data Migration

Not included in base implementation

4.6 Testing

4.6.1 Unit Testing

Column will conduct a series of tests that will review all configurations and integrations developed. Column will use the documented requirements to test against the application functionality. Column will also review the configurations and integrations to ensure that they have been optimized for performance. Column will correct any inconsistency found during the unit testing.

4.6.2 Demo for UAT Testers

Training at this level will consist of the individuals responsible for testing the application prior to production roll out. Column will provide an application demonstration, which will be presented to the testing team based on the standard test scripts.

4.6.3 User Acceptance Testing

This stage of the project will allow Client personnel the ability to test the incoming software solution, including end-to-end testing. Issues found during UAT will be reviewed, prioritized, and resolved. Resolved issues would then be retested to ensure completeness of the resolution.

- User Testing - During this step, the Column consultant will be present to answer any questions and to make any immediate configuration fixes that may be a roadblock in completing the standard test scripts.
- Review issues found during testing and evaluate issues – the Column Project Manager and Client's Project Manager will review all issues. All issues will be categorized into either a valid issue or enhancement.
- Resolve valid issues - Column will resolve valid issues that fall within the scope of the configurations and customizations identified in this document.
- Retest resolved issues - Tester will retest to resolve issues and provide final sign-off.

Client Participation

- Client should ensure adequate time and resources are provided to test the applications and configurations as required for the engagement.
- Client will review completed test data, verify functionality and business requirements are met, and sign-off on their completeness.

4.7 Documentation and Knowledge Transfer

A document will be produced which lists all of the configurations made to the base application. This document is primarily intended for the Case Management Administrator and is an important component of the knowledge transfer. This document is used in conjunction with relevant User and Administrator Guides to provide a complete overview of the applications as well as their maintenance and administration.

Column will provide one (1) knowledge transfer session, which will provide the necessary time to allow the Column developers and the Client Administrators to review the Configurations Document along with answering any technical questions regarding the deployment.

Client Participation

- Client should ensure adequate resources are provided to take part in the knowledge transfer for the engagement.
- Client will review and sign-off on the Configuration Document.
- Client will review and approve all documentation in a timely and reasonable manner.
- Documentation may be reviewed for additional clarity and content by the Client one (1) time and then updated if necessary. Additional revisions of the documentation may require additional person days to be added to the estimate using the Change Control Procedure. Client will provide feedback and acceptance within five (5) days of delivery.

4.8 Rollout and Post Live Support

4.8.1 Production Rollout

During this stage, consultant will assist in moving the Column Case Management System into production. Also, the consultant will be available for an agreed amount of time for post live support to address any issues that arise. This stage does not include any new development. The following tasks will be performed as part of the production rollout:

- Assist Client in putting together rollout plan
- Execute production rollout plan (migrate application to production)
- Provide support for System Administrator

4.8.2 Post Live Support

Column will provide Post Live Support to the Client for a specific and set amount of time as detailed in the Price Table.

Client Participation

- Client will validate the new application is functioning as expected.
- The Client Administrators will be on site.
- Client will approve configuration change requests for their production environment within two (2) business days.
- Client will provide necessary support resources to support the system after deployment. These resources will receive appropriate training before production deployment of the applications.
- The Client Administrators will be responsible for the development and execution of the rollout plan should one be desired.
- Client will participate with any post live support activities, as necessary. Examples of such activities may include demonstrating issues encountered to provide clarification, retesting resolved issues, knowledge transfer, gathering and submitting issues through a central point of contact, communicating status.

5 Training

5.1 Training Discovery

A Column training resource consultant will perform information gathering. The objective of this activity is to gain an understanding of the current Client environment. During such discovery, the consultant would work with the Client Management and designated staff to gather information and become familiar with the manner in which Client currently processes. Necessary screenshots and custom process information are gathered to be used in training manuals.

The discovery may be done on-site or remotely as long as remote access to the Client's Column CCM is available. During discovery, the consultant will work with the Client's management and staff to:

- Gain an understanding of the current Client business and training environment, training goals and objectives, and training methods.
- Become familiar with the manner in which the Client will be utilizing the new Case Management applications.
- Gather process information to be used for reference purposes when creating the Training Guide.

Client Participation

- Client will provide resources familiar with Client business procedures and work steps who will work with Column resource to define Client processes and provide existing system screenshots when necessary.
- When appropriate, Client will ensure that the appropriate personnel are present and available during the discovery.

5.2 Creation of Presentation Materials

Column will provide Client Administrator Training Documents for use in delivering the Administrator and End User training sessions. Column will create custom documents covering the CCM. Column will provide each set of documents to the Client for review and will conduct one (1) revision cycle for each, (Administrator and End User), based on Client feedback.

Client Participation

- When appropriate, Client is primarily responsible for interacting with and soliciting feedback from the end user community. This feedback needs to be provided to Column in a timely fashion.
- Client will review each completed End User Training PowerPoint and sign-off on its completeness.

5.3 Administrator Session

A Remote Column training resource consultant will perform Administrator training. The activities of the training include:

- Provide detailed instruction on the administrative principles, editable features, functions, and use of Application, as modified by Client and detailed in the Administrator Guide.
- Perform at least one custom-created lab.
- Can be delivered remote or in-person
- Materials are reusable

Application	Sessions Attendees	Length of Session	No of Sessions	Type of Training
Column Case Management	Up to 3	16 hours	2	Instructor Led Remote

Client Participation

- Client will ensure that the appropriate Administrators attend the training.
- Client shall provide the training facility for all training.
- Client will sign off on completion of the Administrator Training.

5.4 End User Training

Column will conduct an End User Training-The-Trainer Sessions as indicate below. The focus of training at this level will be on the CCM from a high-level perspective as implemented in the Client's environment. This training should also provide an overview of the Client's process. User Guide and application demonstrations will all be used to facilitate the training exercise. Can be delivered remote or in-person and materials are reusable.

Application	Sessions Attendees	Length of Session	No. of Sessions	Type of Training
Column Case Management End User	TBD	24 hours	3	Instructor Led Remote

Client Participation

- Client will ensure that the appropriate end users attended the sessions.
- Client will provide all hardware and connections necessary to allow attending students to work hands-on with the CCM application.
- Client shall provide the training facility for all training.
- Client will sign off on completion of the End User Training.

6 Project Management

6.1 Project Management Activities

Project Management Services include ensuring the Client has received and understands the pre-implementation documentation which covers the functionality and data requirements of the modules to be implemented as part of this engagement.

Project Management will continue throughout the engagement to ensure project milestones are being met and the proper resources are allocated and available. In addition, the Column Project Manager will provide and recommend solutions when obstacles occur that may impact the successful or timely completion of the engagement.

Column Project Manager will work closely with Client's Project Manager to:

- Review the pre-implementation documentation with Client as required
- Create and manage the project plan as required
- Manage staffing/resources
- Set expectations
- Track progress of engagement activity reports
- Develop, distribute, obtain, and catalog all Column signoff approvals to Project Manager, Sponsorship, and Executives
- Provide overall direction of tasks and Column resources
- Ensure project direction keeps in line with agreed business case
- Protect milestones and proactively intervene before target dates slip
- Conduct Column daily, or as required, scrum meetings and develop/distribute notes from the meeting(s)
- Manage project issues and risks
- Develop change requests and distribute to appropriate resources for approvals including changes to scope, schedule, budget, and/or resources
- Manage all tasks and resources to review and approve project deliverables
- Resolve any technical issues that arise so that Column consultant(s) can continue to work on development and integration
- Manage and coordinate all aspects of testing cycles; Development, QA, UAT, and regression
- Manage and coordinate all aspects of migration from environment to environment
- Manage and coordinate all aspects of production support activities
- Manage all tasks and resources to review and approve project deliverables
- Obtain sign-offs for key milestones
- Contain scope creep
- Track progress, and provide highlight reports (including project burn rate)

- Perform Project Close Out

7 Deliverables

The content and format of all documentation produced will be created according to Column standard practices. The documents will be produced in either Microsoft Word, Excel, or MS Project formats.

7.1 Project Initiation Documents

Column will provide the Project Initiation Documents that define how the project will be initiated, managed, controlled, and closed. These may contain any, or all, of the following items:

- Project Approach
- Project Brief
- Exception Plan
- Communications Plan
- Stage Plan
- Quality Plan
- Risk Log
- Project Schedule
- Business Case

7.2 Project Plan/Schedule

The Project Plan is a Microsoft Project Plan file that defines the tasks and schedule of tasks for a project including dependencies, milestones, and resource assignments.

7.3 Highlight Reports

Column will provide weekly status reports to the Client Project Executive and Client Project Manager. The report will include the following as required for each reporting period:

- General comments
- Issue Log/Change Control log
- Detailed budget/scheduled performance
- Activities performed during the period

7.4 Use Cases for the Column Case Management System

Column will provide Standard Use Cases to describe the out of the box Column Case Management application. Column will provide the following use cases for the following applications:

- Shared Use Cases
- Column Case Management
- Reporting

7.5 Functional Requirements Overview

Column will create a Functional Requirements Overview (FRO). The FRO is a technical document that describes all of the requirements collected throughout the Phase 1 workshops. The FRO will then be reviewed by the Client and Column to determine the in-scope requirements for Phase 2 – Implementation. The in-scope requirements will be further detailed in the subsequent Functional Requirements Document.

7.6 Functional Requirements Document

Column will generate a Functional Requirements Document (FRD). The Functional Requirements is a technical document that describes in detail the incoming system design. The Functional Requirements document may include the following elements:

- Process diagrams
- Data mappings
- Technical requirements
- Code recommendations
- Architectural design
- Overview of solution being recommended and why
- High-level migration strategy

7.7 Configurations Document

On completion of the project, Column will provide a document outlining all of the configurations completed by the Column consultants. This document will capture all changes made to the base applications to support the Client's business requirements and processes.

7.8 Integrations Document

On completion of the project, Column will provide a document outlining all of the integrations and configurations completed by the Column consultants. This document will capture all changes made to the base applications to support the Client's business requirements and processes.

7.9 Presentation Materials

A PowerPoint will be prepared for the Administrator Training delivery of the CCM and may include but is not limited to the following:

- CCM Overview
- Column Core Workspace
    - Forms
    - Column Search
    - Primary Forms
    - Consoles
    - Cases Console
        - Viewing Case Records
    - Creating a New Case
        - Entering Case Information from a Template
        - Case Review/Assignment
        - Assignments
    - Managing a Case
    - Other Consoles

8 Completion Criteria

Column will have completed this SOW when the documents listed in the Deliverables section have been delivered, reviewed, approved, and signed by the Client Project Executive.

8.1 Close Out Activities

As part of project completion, Column will conduct a "Lessons Learned" meeting facilitated by the Column Project Manager. Additionally, Client will be asked to complete a brief survey evaluating Column's performance throughout the project.

These two metrics are part of Column's continuous improvement plan and will be used as a reference and resource on future collaboration.

9 Staffing Requirements

9.1 Column Staffing

Column will assign appropriate technical/consulting resources to complete the project in a timely manner with high quality standards. Column will also assign a Project Manager with overall responsibility for the execution of this SOW as outlined in the Project Management section of this document. A detailed description of the Column resources to be utilized for this project can be found in Section 9 – Pricing, 9.1 - Rate Table.

9.2 Client Staffing

9.2.1 Client Project Executive

Client will assign a Project Executive who will serve as Column executive-level contact. The Project Executive will have full authority to act on behalf of Client with respect to:

1. Leading the Project Board
2. Making major project decisions
3. Communicating the goals and benefits of the project to the organization
4. Project deliverable sign-off authority

9.2.2 Client Project Manager

Client will also assign a Project Manager for the duration of the project. The Client Project Manager will work with the Column Project Manager to help plan the work effort and keep it on schedule. The Project Manager's responsibilities include:

1. Coordinate activities of assigned Client personnel to ensure adequate participation in all SOW activities.
2. Help resolve issues and escalate them within the Client organization, as necessary.
3. Obtain and provide information, data, decisions, and review Deliverables within two (2) business days of Column request, unless Client and Column agree to an extended response time. Delays may negatively impact the estimated schedule and final charges for this SOW.

9.2.3 Client Team Members

Client will provide resources to participate in the execution of this SOW. The project may require additional Client resources other than those listed here. The anticipated Client resources for this project listed below:

1. **Application Process Owners** – These resource(s) will be responsible for providing application process and technical knowledge as well as contributing to decisions. This may include but is not limited to:
   - Case Worker Units
   - Process SME
   - Service Level Manager – These resources are responsible for establishing, reporting, and maintaining the delivery of the agreed upon service levels to Clients.
2. **Administrators** – These resources know the most about the software being managed, whether it is an operating system, database, or application. The Administrators supporting the environment software can usually be found in the following groups:
   - Application - specialist / developer group

3. **Application Managers** – These resource(s) will be responsible for providing application process and technical knowledge as well as making decisions. This may include but is not limited to:

   Subject Matter Experts – These resource(s) will be responsible for providing application and technical knowledge with regard to the Clients implementation of the following:
   - LDAP/SSO (User Authentication)
   - Email (inbound and Outbound)
   - Others

   Reporting Application Administrator – These resource(s) will be responsible for administering the Jasper Reports application. This may include but is not limited to configuring user accounts, groups, folders and permissions.

   Reporting Developer – These resource(s) will be responsible for extending the Column Case Domain to accommodate new business requirements. This may include but is not limited to creating advanced reports in Jaspersoft Studio.

   Application and Network Administrators – These resource(s) will be responsible for providing subject matter expertise on any of the applications or networks invovled in the products. This may include but is not limited to informing the stakeholders on the capabilities and costs of configuring or reconfiguring applications and networks.

   Testers – These resources are knowledgeable of the business processes and will be heavily involved through the development, testing and deployment of the system.

   Client Trainer – These resource(s) will be responsible for learning the product and conducting training.

   Client Project Team Leaders – These are the primary project ownership committee members who will be responsible for making final decisions on the Case Solutions requirements.

10 Pricing

10.1 Role Card

Rates as are based on business days, excluding weekends and holidays and do not include travel expense.

Role / Title	Definitions
Project Manager-Level 2	Extensive knowledge with 3+ years multiple project/ platform experience (Case, Service Assurance/Automation). Provides project leadership and direction. Defines, manages and controls project scope, budget and timelines. Experienced with project software and processes, SDLC, change/risk management. Excellent planning and organizational skills, people management, decision making and communications both verbal and written. Manages changes, escalations and reporting. Experienced with project management methodologies, PMP, Agile, etc.
Case Management Senior Solution Architect	Comprehensive knowledge in Case Management products; APIs and integrations, 5+ years with multiple customer experiences. Responsible for the solution vision and the execution of the vision into the solution. Is knowledgeable of product and industry best practices. Provides recommendations and solve problems. Provides leadership and guidance.
Case Consultant	Expert knowledge of the delivery of Column Case Management implementations and integrations. Excellent understanding of case processes. Has implemented case management applications on 3+ year's project implementation experience with installations, code development, integrations, APIs, testing/scripting, migrations and production rollout.
BI Consultant	Extensive knowledge of Business Intelligence with 3+ years'

	experience. Expert knowledge of ETL design and development, logical and physical data modeling (relational and dimensional), database design, report development, requirements gathering, data architecture, data analysis, implementation of BI systems utilizing tools including, but not limited to; SAP Business Objects, Crystal Reports, JasperSoft, Spotfire, Yellowfin, Column Case Smart Reporting.
Senior Trainer	Expert knowledge of Case Management process flows. Excellent technical writing skills, well versed in training material development using various delivery methods (Instructor-led, Web Training, Train the Trainer, etc.). Experience using training delivery solutions such as Captivate, Actuate, etc. Experience in conducting Administrative, End User, and Train the Trainer training sessions with 5+ years training experience.

10.2 Price Table

10.2.1 Requirements Analysis and Implementation Cost

Task	Est. Hrs.	Rate/Hour	Estimated Costs
Project Initiation - Environment Set Up - Project Kick Off Document - Project Kick Off Meeting	16	$ [redacted]	
Implementation Workshops - Case Management Application Workshop - Customer Process Review - Case Foundation Data Workshops - Reporting Workshop	56	$	
Functional Requirements Review - Create/Review FRD	40	$	
Configurations - Investigative Consoles - Investigative Forms - Milestones and Approvals - Templates - Authentication - Email (Inbound and Outbound)	180	$	
Case Foundation Data - Review Case Foundation data provided - Load Case Foundation data (2 Loads) - Review data loaded/make necessary adjustments	56	$	
Reporting - Reporting Demonstration - Create Reports and Dashboards	104	$	
Testing - Unit Testing - Tester Demonstration - Unit Acceptance Testing and Remediation	262	$	
Training Activities - Presentation Materials for End User Session - Presentation Materials for Admin Session	72	$	

- End User Training Session - Administrator Training Session		[redacted]
Production Rollout - Go Live Preparation Activities - Migration to Production/Go Live - Post Live Support	136	$ [redacted]
Documentation and Knowledge Transfer - Finalize Documentation and Review - Knowledge Transfer	32	$ [redacted]
Project/Technical Management	140	$ [redacted]
TOTAL ESTIMATED HOURS / COST	**1110**	[redacted]

The cost for services is [redacted] exclusive of applicable taxes, travel, and living expenses. Column will charge Client only for actual hours of effort completed. In addition, on a weekly basis, actual travel and living expenses will be billed to Client in accordance with the attached Column Travel and Expense Policy. The attached Terms and Conditons define all additional terms of payment.

10.3 Change Control

From time to time, Client may request to add or remove services that may necessitate changes to the task or time estimate that are not included in this SOW. If this occurs, an addendum can be made to this SOW in the form of a Change Request. Column will notify if a Client's request warrants a Change Request and advise Client that a Change Request must be executed.

Any Change Request to this SOW must be executed by both Parties. Unless mutually agreed to by the Parties, the project will continue while the price, terms, and conditions of a Change Request are negotiated between the Parties.

10.4 Scheduling

Client and Column will develop a mutually agreeable plan addressing when Column consultants will be onsite. Column recommends at least two (2) weeks' lead time to schedule consultants and make travel arrangements.

Client and Column will take reasonable steps not to jeopardize the established project schedule once agreed to by both Parties. Should Client reschedule the activities, there may be an increase in the project costs for reasons including, without limitation, scheduling of Column resources, airline penalties, and additional expenses.

11 Authorization and Acceptance

This SOW and the attached Terms and Conditions together constitute the entire agreement between the Parties, and supersede all prior agreements and understandings, whether oral or written, relating to this subject matter.

The acceptance of this SOW must be acknowledged and signed below by a duly authorized representative of Client and returned to Column Professional Services in order to initiate scheduling and delivery of the services outlined in this SOW. Signing below indicates authorization for Column to begin work and generate related invoicing. Please note that the terms and conditions contained here and in the attached Terms and Conditions shall supersede any preprinted terms and conditions on a purchase order.

Column Case Management, Inc.	WV HHR
Tim Yario	
Authorized Signature	Authorized Signature
Tim Yario	
President	
Printed Name and Title	Printed Name and Title
12/30/2025	
Date	Date

The SOW effective date shall be the latest date of signature when signed by both parties.

Column Case Management, Inc.	
Tim Yario	Tom Baker
Senior Client Executive	Column Sponsor
Phone No.: 708.408.7715	Phone No.: 630.520.3793
Email: tyario@columncase.com	Email: tbaker@columncase.com
Client Billing Information	**Client Engagement Information**
Address:	Address:
Billing Contact:	Site Contact:
Billing Phone No.:	Site Phone No.:

COLUMN
Case Management

Managed Services Contract

Prepared for:
West Virginia Department of Health and Human Resources

Authorization

West Virginia HHR ("Client")	
Created by:	Column Case Management LLC
Authorized on:	December 30, 2025

Version Control

Version	Date	Author	Comment
V1.0	12/30/2025	FG	

Table of contents

Purpose and Objective

The West Virginia Department of Health and Human Resources could engage Column Case Management LLC ("Column") for the provision of Managed Services to augment its internal team(s) in remotely managing day-to-day application operations for a set of in-scope technologies. This Managed Services Contract ("MSC") describes the services to be provided.

The MSC will be governed by the attached Terms and Conditions and the Column Network Access Security Policy.

1 Service Fee

The following table documents the fees associated with the managed services for a set of Client environments as defined in the section entitled "Serviced Environment".

Operational Managed Services Pricing

Services	Service Term	[redacted]
Global Managed Services • Program Management / Road-Mapping • Application Administration • Service Delivery Reviews • Application and Reporting Enhancement Service ○ Up to 50 hours per Service Period • Assigned Technical Account Manager ("TAM")	11/1/2026– 10/31/2027	[redacted]
Total MSC Cost		[redacted]

Invoice Schedule

Payment	Invoice Date	Invoice Period	[redacted]
1	9/1/2026	11/1/2026– 10/31/2027	[redacted]

Payments made are ***non-refundable***.

2 Managed Services Scope

2.1 Serviced Environment

The following tables document the application(s), integration(s), and architecture in-scope for the MSC. They are collectively referred to as the Serviced Environment.

The following applications are in-scope and part of the Serviced Environment for this Managed Service:

Application	Version	Patch
Column Case Management	9.1 or greater	N/A

2.2 Service Operations Hours

Service Hours are:

- Business Hours: Monday – Friday 7:00 am – 7:00pm Central Time ("CT")
- Critical Break-Fix: 24x7x365

The following maintenance service windows can be utilized by Column for the delivery of, but not limited to, system software patches, application software patches, and application code updates subject to agreed change and release management processes:

- Weekends, Saturday 12:00pm – Sunday 8:00pm CT
- Wednesdays, 5:00pm CT - release application code updates

Occasionally, cases prioritized as critical will require an ad hoc maintenance window. Such scenarios will be subject to Client's emergency change management processes and will only proceed with Client approval.

2.3 Client Pre-Requisites for Managed Service

VPN

If required to access the Serviced Environment, Client must provide VPN access as requested by Column, which will be used exclusively by Client's assigned Column Managed Service team.

Administration Access

Client must provide administration accounts to the Serviced Environment as requested by Column for Column team members. Column will provide a fully defined user profile to Client for reference purposes.

Client Responsibilities

- Appoint up to three (3) contacts to act as Column's primary point(s) of contact ("POC") who are empowered to make decisions and approvals as relates to the Serviced Environment.
- All technology components must be owned by Client, and Client must be in full compliance with technology licensing terms and conditions.
- Ensuring all underlying technology and architecture is deployed, configured, and meets the Client's own internal IT policies, requirements, and standards.
- Communicating to Column when underlying technology that is in scope for the MSC is subject to change control activities, which have the potential to impact the availability of the deployed systems.
- Network availability and health.
- Maintain any monitoring solutions Client has deployed to monitor the Serviced Environment.
- Maintaining or integrating the system with any other Client systems, or enhanced integrations, except as explicitly stated herein.
    - Provide advanced warning of anticipated business changes that may require any modification or enhancement of Client's Serviced Environment. For example: create a requirement for additional user licenses, create a requirement for additional server capacity, create a requirement for additional integrations, or other integrations or out of scope technologies, etc.
- Make available ,as needed, technical resources to coordinate and deliver on all Client data center preparation and implementation tasks to ready the systems for application activation tasks.
- Provide all internal Client training, awareness, and documentation, other than that provided by Column and documented herein, as may be required for Client designated users to enable effective use of Column's services.

- Maintain ownership and responsibility for the quality and integrity of all Client data held on the Serviced Environment.

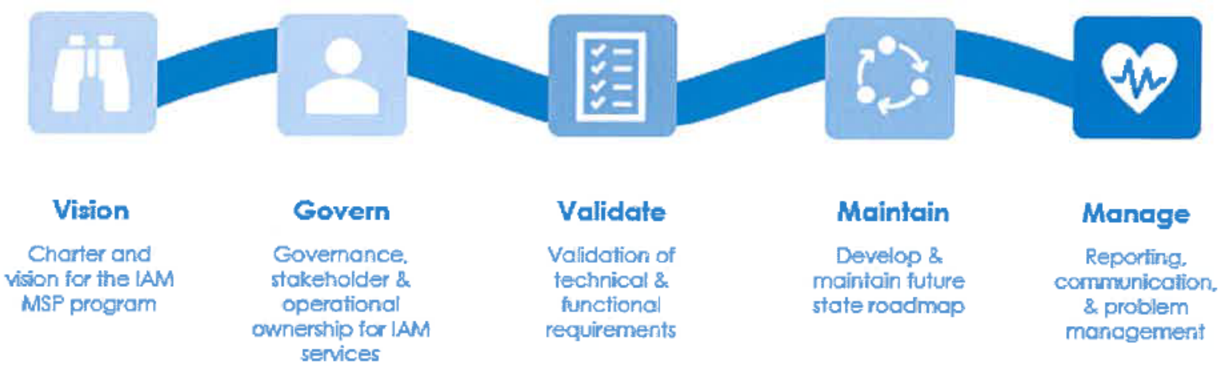
2.3 Out of Scope

The following items are deemed out of scope regarding this Contract:

- Any activities that require an on-site presence. Column Managed Services is delivered remotely.
- Maintaining or servicing any application not named as part of the Serviced Environment.
- Maintaining or servicing any hardware, including network components, outside of the Column Network
- Any process, organizational, onboarding, or business for applications outside the Serviced Environment.
- Data cleanup services, except if a data error occurs solely as a direct result of a change introduced to the Production Environment during the deployment of a Change Request.
- Formal Training.
- Customized end-user documentation.
- Creation of the new report
- Development of, or support for, any application functionality included on the significant Issues List discovered, documented, and signed off by Client and Column during Column's Health Check that continues without remediation.
- Perform data center hosting and management functions.
- Resolution of incidents and problems caused by the Client neglecting their responsibilities as defined and detailed throughout the MSC
- Building out new workflows.

3 Program Management and Road-Mapping

Column Managed Services provides clients not only with application experts but given the shared resource nature of a managed service, Column personnel have additional insights in application best practices and governance. Throughout the Service Term, Column will look for opportunities to optimize the Serviced Environment as part of an application continuous improvement strategy.



Column Case effectively provides industry-standard recommendations based on how the Serviced Environment is being utilized daily and what we are observing in other similar client environments. During the first month of the Service Term, Column will conduct a health check and various knowledge transfer sessions with the Client to establish a baseline for the Serviced Environment. We will develop action plan(s) and/or recommendations based on discovery sessions and opportunities for improvement and engage the appropriate Column personnel as needed.

4 Application Case Management

Column Managed Services includes case management defined as triaging, responding, escalating, and resolving Client issues encountered in normal, day-to-day use of the Serviced Environment. All cases must be submitted by POCs through email, phone, service desk integration, or Column's service portal. Case management is limited to cases related to the Serviced Environment.

Upon intake at Column, cases will be qualified as either Support, those requests that are service impacting, and case resolution refers to the restoration of the service; or, Enhancement, those requests that introduce new functionality to the Serviced Environment. Enhancement cases will follow the procedures specified in the section entitled "Application Enhancements". Support Cases, in contrast, are cases related to application usability in its current operational state including questions, problems, unusual error messages, response time issues, user application access issues, and basic troubleshooting.

Level 1 (L1) incident service means responding to questions and performing basic troubleshooting and problem isolation. Column's Service Operations Staff will escalate incidents to specialists who provide Level (L2) incident service for response to more difficult questions, undocumented error messages, data administration exception management activities, complex process questions and further troubleshooting.

If Column determines that the Serviced Environment is not at fault for a Support Case, Column will notify the POC to take responsibility for ongoing triage and resolution. The related case in Column's service portal will be resolved. Should a change to the Serviced Environment be required to resolve a Support Case, a Request for Change ("RFC") will be created by Column in alignment with Client's change management processes. RFCs will be executed subject to the process defined in the Change and Release Management section of this document. Column is not responsible for executing changes to systems other than the Serviced Environment.

4.1 Support Case Service Level Agreements (SLAs)

Column will support service targets for Support Cases as defined in the SLA Matrix below. For the purposes of clarity, a Support Case is an issue that has a service impact, either moderately or severely impacting the user or user groups from properly using the Serviced Environment.

SLA Matrix

Client Impact	Definition	Response Service Target Times	Resolution Service Target Times*
P1 – Critical	**Severe Impact**: Critical impact problem that makes the Serviced Environment unavailable to conduct business: • Business service is not operational • Production system crashes • Data integrity at risk Examples of P1: multiple users are denied access; severity 1 application monitoring alert.	30 Clock Mins	4 clock hours (80% of P1 Critical Issues resolved) 8 clock hours (98% of P1 Critical Issues resolved)

P2 – High	**Major Impact**: the business service, major application, or system is seriously affected, or implementation stopped. Examples of P2: unusually slow response times; application error messages indicating the transaction cannot be saved or key action cannot be performed	30 Business Minutes	12 Business Hours (80% of P2 High Issues resolved) 24 Business Hours (98% of P2 High Issues resolved)
P3 – Medium	**Minor Impact:** Incidents related to the business service, major application, or system causing moderate user impact: no data has been lost, and the business service is still functioning. The issue may be temporarily circumvented using an available workaround. User access issues or access management requests are examples of P3 Also, includes business impacting Service Requests.	2 Business Hours	3 Business days (80% of P3 Medium Issues resolved) 5 Business days (98% of P3 Medium Issues resolved)
P4 – Low	**No Impact:** Non-critical non-service impacting issues, general questions, enhancement requests, or documentation issues Also, includes enhancement Service Requests	4 Business Hours	21 Business days (98% of P4 Low Issues resolved)

*Column's Client portal will be the system of record to track all SLA times.
A clock minute is defined as each minute that elapses within the 24x7 service period only. A clock hour is defined as each full hour that elapses within the 24x7 service period only.
A business hour is defined as each full hour that elapses within the M-F 7:00am – 7:00pm CT service period only. A business day is defined as each full day that elapses within the M-F 7:00am – 7:00pm service period only.

Resolution times are based on historic performance with existing Clients. Resolution times are based on best effort and can be affected by, but not limited to, the following:

- Client response times
- Client infrastructure failure
- Workarounds or patches to defects delivered by application manufacturer(s)

Workaround vs. Resolution

- Column may implement a workaround solution that will restore full functionality of the serviced products. Implementation of a workaround solution will not release Column's commitment to identifying a final solution. Client may choose to accept a workaround as a final solution, particularly in instances of product defects with no planned fix from the manufacturer. Column will document any workaround in the case notes for transparency.

Clock Stops

- Column will stop the response and resolution elapsed time clock in the following circumstances:
- When troubleshooting efforts require additional information from either Client or the software manufacturer prompting the case to be in a "Pending" status.

- Where insufficient evidence can be obtained using reasonable endeavors to determine the root cause, the case record will be set to resolved – not reproducible.
- In scenarios of a product defect or known error and the case will be set to "resolved", even if the manufacturer has not released a fix.
- If a root cause analysis results in a recommended change to the Serviced Environment and the change is within the scope of this MSC, an RFC will be created and associated to the case. Client will be notified of the progress of the RFC in the regular service review.

The extent to which Column can carry out any bug investigations, root cause analysis, and patch/bug release testing is dependent on the configuration and availability of operational test environment. Any investigation awaiting availability of a test environment will remain in 'pending' state until it can be progressed or is agreed to be closed with no progress.

Client Responsibilities

- Any out of scope change tasks are the full responsibility of Client, such as functional definition, technical definition, scoping, implementing and testing activities for Client software or hardware not included in the definition of the Serviced Environment.

4.2 Change and Release Management

Column will align to Client's standard change and release management procedures to record, track and manage changes to Clients Production environment. Unless otherwise specified, change and release management covers the evaluation, testing and implementation of application changes to the Serviced Environment ensuring consistency between Production and non-Production environments. Column will complete the following analysis, recommendations, approval, implementation, and testing steps to process the RFC as applicable to the change request as detailed below.

- Evaluate and assess
- For Application Administration tasks, perform change and release according to defined processes
- For Bulk Data Loads, schedule change based on pre-defined data load schedule
- As appropriate, cross reference and/or associate RFC with concurrent or scheduled development projects and other related RFCs to confirm the change has no overlap with on-going or planned application modifications
- Confirm Client impact level and re-classify if appropriate
- Re-classify if out of scope
- Reference to upgrade paths and compatibility matrices (if applicable)
- Provide a scope of work (estimated number of days to complete work and deploy the change)
- Provide recommendations and implementation time frame to requestor
- Review progress of RFCs in regular service review meetings
- Column requires Client approval for an RFC either via Client's Change Approval Board ("CAB") process or by getting POC signoff in the related case
- Provide fulfillment schedule to requester
- Define detailed change of tasks and back-out plan
- Perform and test all change tasks
- Create test cases and perform regression testing (if deemed applicable by Column)
- Request Client user acceptance testing (if deemed applicable by Column)
- Release to production

In the event that an RFC requires changes that are outside the scope of this MSC, Column's Account Manager will engage with POC to propose a Change Request to the MSC prior to scheduling any work.

Client Responsibilities

- All processes necessary to be able to provide the required RFC approval to Column will be the responsibility of Client.
- Client is responsible for the timely internal processing of their RFCs. Delays caused from Client's delay in completing approvals are the Client's responsibility.

4.3 Application Administration Service

Column will provide Client with application administration that involves adding, deleting, updating, and modifying pre-configured out of the box ("OTB") administration and configuration data, settings, and processes for the Serviced Environment. The following terms of use apply to the application administration:

- A single case for data changes exceeding ten (10) data items, or a series of related requests in excess of ten (10) data items, will be classified as a bulk data load request and will, subject to agreement by the POC and Column's TAM, either be progressed using AEs or as a Change Request as defined in the MSC Change Request section.
  - Bulk data loads will require use of Column provided templates for data consistency.
- Column maintains the right to review all cases to determine if they are in-scope for the MSC and, with prior notification to the Client, reject a case as out-of-scope.
- Column will execute the administration requests at any time of day to meet the contracted service level objectives; however, should Column reasonably believe that the execution of the administration request may negatively impact the performance of the Serviced Environment, Column reserves the right to execute the administration requests at specific times to minimize such negative impact on the performance of the Serviced Environment. SLAs will not be measure during such a period.
- Application administration work must originate as a case submitted to Column's service portal.

Client Responsibilities

- The Client will ensure that the Service Request includes a detailed description.
- In the event Column advises against any application administration task, Client will be responsible for fulfilling that request should Client still want to implement.
- Client will execute application administration tasks which involve changes to data elements that require intervention or support from on-site resources to deliver.
- Application administration tasks which involve the execution of data changes into non-production application environments.

5 Service Delivery Reviews

Column will provide Client with a structured Service Delivery Reviews so that Client can monitor and measure the contracted services delivered by Column. Service Delivery Reviews are delivered by Column's TAM at an agreed upon cadence, in order to provide the Client with detailed information related to the overall performance of Column's delivered services.

Column will provide the following as part of the Service Delivery Review Reporting Service:

- Metrics on the following data points
  - Count of cases open in the past 30 days
  - Count of cases resolved in the past 30 days
  - Count of case response SLAs breached in the past 30 days
  - Count of case resolution SLAs breached in the past 30 days
- If Column leadership deems it relevant to engage in discussions of a technical nature, Column's TAM will schedule Column's lead technical resources to attend the service delivery reviews.
- Column's TAM or Project Manager (if applicable) will provide and agenda and meeting minutes.

- Column's TAM will facilitate service delivery reviews.
- Service delivery reviews will be a maximum of one (1) hour monthly with any additional conversations scheduled as appropriate.

Client Responsibilities

- Client will ensure that POCs and any additional required participants are available to join the service delivery review.

6 Application Enhancements

Column will perform development, in a limited manner, application enhancements ("AE") to augment the Serviced Environment's capabilities. AEs will be tracked as Enhancement cases in Column's service portal. An application enhancement is defined as any remotely implemented change in system functionality, workflow, advanced data, and/or configuration administration, including look and feel, to the Serviced Environment. Examples of AEs, but are not limited to, the following:

- A change in system functionality, workflow code or look and feel of the application components within the Serviced Environment.
- A change to complex and/or interdependent data configuration items.
- A change to the Serviced Environment application data structures based on data cleansing services to resolve data integrity or synchronization issues excluding those that may be the result of changes made by Column in the normal execution of the services stated herein.
- A change that can be scoped, designed, tested and released by Column remotely, i.e., does not require the contribution of on-site resources to either scope and define requirements, perform the technical design and/or implement the enhancement.

Column will provide Client with agreed upon number of hours to be consumed throughout the Service Term as documented in the "Service Fee" section. The following will be provided as part of the AE service:

- Assess each AE request and provide the Client the following:
  - A functional requirement description
  - A level of effort ("LOE") to complete the AE
- Column will manage the development and release of the AE subject to the contracted Change and Release Management procedures.
- LOE will be tracked in thirty (30) minute increments. Column will record the effort associated with requests against Client's entitlement of AE over the Service Term.
- Unused AE will not be credited either on termination of service, contract renewal, or expiration of the MSC.

Although Column will endeavor to fulfil Client requested AEs, certain AEs are impactful enough to fall out of scope for the AE service. Column generally recommends AE's greater than eighty (80) hours of LOE be addressed by Column Professional Services. Examples of out-of-scope AEs include, but are not limited to, the following:

- Major version migrations, upgrades, and related post-upgrade customizations of Serviced Environment or related infrastructure.
- Changes to integrated technologies.
- Installing new software and associate configuration, customization integrations, and data loads.
- Installing and/or configuring new environment(s) to the Serviced Environment (i.e., building a net new Training, non-Prod environment).
- Changes to any server or application components that require the contribution of on-site resources, technical solutions consultant, and/or pre-sales resources to scope, design, and/or deliver.
- Changes that require the commitment of and contribution for key pre-sales or senior systems architect resources to complete.
- Maintenance or management of Client's knowledge management content.
- Any changes requiring third party vendor involvement

Client Responsibilities

- Client will initiate requests for AEs by submitting an Enhancement case to Column.
- Client will ensure that the Enhancement case includes a detailed explanation of the business requirement for the AE, along with the Client's assessment of the AE priority.
- Client will be responsible for final approval of any Column assessed Enhancement cases submitted back to the Client for approval.
- Executing major version migrations, upgrades, and related post-upgrade customizations of any of the Serviced Environment.
- If an LOE indicates that the Client has insufficient entitlement hours to execute an approved AE, then the Client will elect either:
  - Execute a Change Request to increase entitled hours for the Service Term
  - Cancel the Enhancement case
  - Postpone the AE until the next Service Term

7 Staffing Requirements

7.1 Column Staffing

Column will provide resources to participate in the execution of this MSC. Some of the staffing required will include:

- **Application Consultants** - comprised of application experts onboarded into the Serviced Environment due to their core experience related to all technical aspects of the remotely min- scope application(s).
- **Technical Account Manager** - The designated commercial/technical manager assigned to the Client account. This resource will oversee all aspects of ongoing service delivery for the Serviced Environment and will provide services progress and status reporting to the Account Manager.
- **Application Team Lead** – Direct manager of TAM and assigned application consultants who acts as a technical escalation point.
- **Director of Managed Services** – Secondary escalation point for commercial and relationship issues as relates to Client and Column's Managed Services partnership.
- **Account Manager** - Primary commercial point of contact to oversee all aspects of the Client's partnership with Column and provide ongoing communication and coordination between Client's POC and the extended service delivery team.

7.2 Client Staffing

The client will provide resources to participate in the execution of this MSC. Staffing required will include but is not limited to:

- **Program Manager** – Client Personnel, ensuring that Client performs its responsibilities as defined in this MSC.
- **Point(s) of Contact** – These resource(s) will be responsible for providing the application process and technical knowledge as well as making decisions. This may include, but is not limited to:
  - **Service Readiness** - Client will be asked to identify a person to provide Column with access to all required Client application documentation and to coordinate and participate in all requirements reviews and user acceptance testing (if applicable), training and service health checks, service provisioning and the service readiness review, and provide final SRR approval.
  - **Service Operations** - POC for all aspects of ongoing service delivery with Column, including participation in periodic service delivery reviews and Client-internal change management process and approval ownership.

- **Service Support -** Client internal application support or Help Desk who will assist Column with Client dependencies.
- **Application Administration** – Client resource with administrator permissions in the Serviced Environment.

8 Contract Change Request

From time to time, Client may request additional services that may necessitate changes to the task or time estimate that are not included in this MSC. If this occurs, a Change Request to the MSC will be required. A sample Change Request form is attached in Appendix A.

9 MSC Expiration or Renewal Notification

Column will provide written notice thirty (30) days before the end of each Service Term outlining the following:

- Confirming the date on which the next Service Term will commence under the MSC, together with details of the annual charges for those services to be provided; or
- Give notice to the Client that Column will not renew this MSC beyond the end of the current Service Term in which case this MSC will automatically terminate; or
- Provide details of the last day on which the Client must give notice in writing to Column to terminate the services under this MSC at the end of the current Service Term.

Authorization and Acceptance

This MSC, the attached Terms and Conditions, and the attached Network Access Security Policy together constitute the entire agreement between the parties and supersede all prior agreements and understandings, whether oral or written, relating to this subject matter.

The acceptance of this MSC must be acknowledged and signed below by a duly authorized representative of the Client and returned to Column at the address below to initiate scheduling and delivery of the services outlined in this MSC. The signing below indicates authorization for Column to begin work and generate related invoicing. Please note that the terms and conditions contained here and in the attached Terms and Conditions will supersede any preprinted terms and conditions on a purchase order.

Column Case Management LLC	WV HHR
Tim Yario	
Authorized Signature	Authorized Signature
Tim Yario, President	
Printed Name and Title	Printed Name and Title
12/30/2025	
Date:	Date:

The effective date of the Contract will be the latest date of signature when signed by both parties. By signing this document, each party warrants that they are authorized to sign to bind the Company for the specified amount and the included terms.

Column Case Management LLC	
tyario@columncase.com	Fred Greifzu
Account Executive	Column Sponsor
Phone: (708) 408-7715	Phone: (815) 351-1532
Email: tyario@columncase.com	Email: fgreifzu@columncase.com
Client Billing Information	**Client Engagement Information**
Address:	Address:
Billing Contact:	Contact Name:
Billing Phone:	Phone:
Contact Email:	Contact Email:

Appendix A – Change Request Form

Version Control

Date	Author	Version	Change Reference
		1.0	Document Creation

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: 1838429 **Doc Description:** INVESTIGATIONS AND FRAUD CASE MANAGEMENT SYSTEM **Proc Type:** Central Master Agreement			**Reason for Modification:**
Date Issued	**Solicitation Closes**	**Solicitation No**	**Version**
2025-12-09	2026-01-06 13:30	CRFP 0513 OIG2600000001	1

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000027804
Vendor Name : Column Case Management
Address : 1011 State Street Suite 140
Street : State Street
City : Lemont
State : Illinois **Country :** United States **Zip :** 60439
Principal Contact : Tim Yario
Vendor Contact Phone: 708-408-7715 **Extension:**

FOR INFORMATION CONTACT THE BUYER
Crystal G Hustead
(304) 558-2402
crystal.g.hustead@wv.gov

Vendor Signature X Tim Yario **FEIN#** 83-4650484 **DATE** 12/30/2025

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

ADDITIONAL INFORMATION
THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA OFFICE OF INSPECTOR GENERAL (OIG), INVESTIGATIONS AND FRAUD MANAGEMENT DIVISION, IS SOLICITING PROPOSALS TO ESTABLISH AN OPEN-END CONTRACT FOR THE IMPLEMENTATION OF A SECURE, CLOUD-BASED CASE MANAGEMENT SYSTEM THAT SUPPORTS FRAUD DETECTION, INVESTIGATION TRACKING, EVIDENCE MANAGEMENT, AND CASE LIFECYCLE MANAGEMENT PER THE ATTACHED DOCUMENTS.

QUESTIONS REGARDING THE SOLICITATION MUST BE SUBMITTED IN WRITING TO CRYSTAL.G.HUSTEAD@WV.GOV PRIOR TO THE QUESTION PERIOD DEADLINE CONTAINED IN THE INSTRUCTIONS TO VENDORS SUBMITTING BIDS

ONLINE RESPONSES ARE PROHIBITED FOR THIS SOLICITATION

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	Year 1: Case Management System	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
43230000	Column Case Management, LLC		

Extended Description:

Vendor will complete the case management system and provide OIG with in-person and reproduceable, web based or DVD, training for both State Office staff and end users within the timeframes agreed on by OIG and the vendor when the contract is awarded.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
2	Year 1: Software Maintenance and Support	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management, LLC		

Extended Description:
Deliverable 2: Case management system in-service date through the end of contract: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
3	Year 1: Technical Assistance	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management, LLC		

Extended Description:
Deliverable 3: Case management system in-service date through the end of contract: Technical assistance will be performed as needed upon contact by OIG.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
4	Year 2: Software Maintenance and Support	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management		

Extended Description:
Throughout contract period: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
5	Year 2: Technical Assistance	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management, LLC		

Extended Description:
Throughout contract period: Technical assistance will be performed as needed upon contact by State or Local staff. Requited technical assistance will be defined in the final scope of work after collaborating with the successful vendor.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
6	Year 3: Software Maintenance and Support	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management, LLC		

Extended Description:
Throughout contract period: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
7	Year 3: Technical Assistance	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management, LLC		

Extended Description:
Throughout contract period: Technical assistance will be performed as needed upon contact by State or Local staff.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
8	Year 4: Software Maintenance and Support	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200			

Extended Description:
Throughout contract period: Vendor will support case management system use and provide system upgrades and maintenance as required by contract and will be prepared to respond to ensure viability of system.

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
9	Year 4: Technical Assistance	1			[redacted]

Comm Code	Manufacturer	Specification	Model #
81112200	Column Case Management, LLC		

Extended Description:
Throughout contract period: Technical assistance will be performed as needed upon contact by State or Local staff.

SCHEDULE OF EVENTS		
<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	VENDOR QUESTION DEADLINE	2025-12-19

	Document Phase	Document Description	Page 7
OIG2600000001	Final	INVESTIGATIONS AND FRAUD CASE MANAGEMENT SYSTEM	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Attachment A : Cost Sheet

Item	Description	Total Cost
Year 1: Case Management System	Vendor will complete the case management system and provide OIG with in-person and reproduceable, web based or DVD, training for both State Office staff and end users within the timeframes agreed on by OIG and the vendor when the contract is awarded.	[redacted]
Year 1: Software Maintenance and Support	Deliverable 2: Case management system in-service date through the end of contract: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.	
Year 1: Technical Assistance	Deliverable 3: Case management system in-service date through the end of contract: Technical assistance will be performed as needed upon contact by OIG.	
Year 2: Software Maintenance and Support	Deliverable 2: Case management system in-service date through the end of contract: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.	
Year 2: Technical Assistance	Deliverable 3: Case management system in-service date through the end of contract: Technical assistance will be performed as needed upon contact by OIG.	
Year 3: Software Maintenance and Support	Deliverable 2: Case management system in-service date through the end of contract: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.	
Year 3: Technical Assistance	Deliverable 3: Case management system in-service date through the end of contract: Technical assistance will be performed as needed upon contact by OIG.	
Year 4: Software Maintenance and Support	Deliverable 2: Case management system in-service date through the end of contract: Vendor will support case management system use and provide system upgrades and maintenance as required by contract.	
Year 4: Technical Assistance	Deliverable 3: Case management system in-service date through the end of contract: Technical assistance will be performed as needed upon contact by OIG.	
Total Cost (Year 1 through Year 4)		

GENERAL TERMS AND CONDITIONS:

1. CONTRACTUAL AGREEMENT: Issuance of an Award Document signed by the Purchasing Division Director, or his designee, and approved as to form by the Attorney General's office constitutes acceptance by the State of this Contract made by and between the State of West Virginia and the Vendor. Vendor's signature on its bid, or on the Contract if the Contract is not the result of a bid solicitation, signifies Vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

2. DEFINITIONS: As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this Solicitation/Contract.

2.1. "Agency" or **"Agencies"** means the agency, board, commission, or other entity of the State of West Virginia that is identified on the first page of the Solicitation or any other public entity seeking to procure goods or services under this Contract.

2.2. "Bid" or **"Proposal"** means the vendors submitted response to this solicitation.

2.3. "Contract" means the binding agreement that is entered into between the State and the Vendor to provide the goods or services requested in the Solicitation.

2.4. "Director" means the Director of the West Virginia Department of Administration, Purchasing Division.

2.5. "Purchasing Division" means the West Virginia Department of Administration, Purchasing Division.

2.6. "Award Document" means the document signed by the Agency and the Purchasing Division, and approved as to form by the Attorney General, that identifies the Vendor as the contract holder.

2.7. "Solicitation" means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

2.8. "State" means the State of West Virginia and/or any of its agencies, commissions, boards, etc. as context requires.

2.9. "Vendor" or **"Vendors"** means any entity submitting a bid in response to the Solicitation, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

☐ **Fixed Period Contract with Renewals:** This Contract becomes effective upon Vendor's receipt of the notice to proceed and part of the Contract more fully described in the attached specifications must be completed within ________________ days. Upon completion of the work covered by the preceding sentence, the vendor agrees that:

☐ the contract will continue for ________________ years;

☐ the contract may be renewed for ________________ successive __________ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's Office (Attorney General approval is as to form only).

☐ **One-Time Purchase:** The term of this Contract shall run from the issuance of the Award Document until all of the goods contracted for have been delivered, but in no event will this Contract extend for more than one fiscal year.

☐ **Construction/Project Oversight:** This Contract becomes effective on the effective start date listed on the first page of this Contract, identified as the State of West Virginia contract cover page containing the signatures of the Purchasing Division, Attorney General, and Encumbrance clerk (or another page identified as ________________________________), and continues until the project for which the vendor is providing oversight is complete.

☐ **Other:** Contract Term specified in ______________________

4. AUTHORITY TO PROCEED: Vendor is authorized to begin performance of this contract on the date of encumbrance listed on the front page of the Award Document unless either the box for "Fixed Period Contract" or "Fixed Period Contract with Renewals" has been checked in Section 3 above. If either "Fixed Period Contract" or "Fixed Period Contract with Renewals" has been checked, Vendor must not begin work until it receives a separate notice to proceed from the State. The notice to proceed will then be incorporated into the Contract via change order to memorialize the official date that work commenced.

5. QUANTITIES: The quantities required under this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below.

☑ **Open End Contract:** Quantities listed in this Solicitation/Award Document are approximations only, based on estimates supplied by the Agency. It is understood and agreed that the Contract shall cover the quantities actually ordered for delivery during the term of the Contract, whether more or less than the quantities shown.

☐ **Service:** The scope of the service to be provided will be more clearly defined in the specifications included herewith.

☐ **Combined Service and Goods:** The scope of the service and deliverable goods to be provided will be more clearly defined in the specifications included herewith.

8. INSURANCE: The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, Vendor shall provide the Agency with proof that the insurance mandated herein has been continued. Vendor must also provide Agency with immediate notice of any changes in its insurance policies, including but not limited to, policy cancelation, policy reduction, or change in insurers. The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether that insurance requirement is listed in this section.

Vendor must maintain:

☑ **Commercial General Liability Insurance** in at least an amount of: [redacted] per occurrence.

☐ **Automobile Liability Insurance** in at least an amount of: _________________per occurrence.

☑ **Professional/Malpractice/Errors and Omission Insurance** in at least an amount of: [redacted]________per occurrence. Notwithstanding the forgoing, Vendor's are not required to list the State as an additional insured for this type of policy.

☐ **Commercial Crime and Third Party Fidelity Insurance** in an amount of: ________________ per occurrence.

☑ **Cyber Liability Insurance** in an amount of: [redacted]_______________ per occurrence.

☐ **Builders Risk Insurance** in an amount equal to 100% of the amount of the Contract.

☐ **Pollution Insurance** in an amount of: _________________ per occurrence.

☐ **Aircraft Liability** in an amount of: _________________ per occurrence.

☐

☐

☐

☐

17. ADDITIONAL FEES: Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly provided for in the solicitation published by the State of West Virginia, included in the Contract, or included in the unit price or lump sum bid amount that Vendor is required by the solicitation to provide. Including such fees or charges as notes to the solicitation may result in rejection of vendor's bid. Requesting such fees or charges be paid after the contract has been awarded may result in cancellation of the contract.

18. FUNDING: This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available. If that occurs, the State may notify the Vendor that an alternative source of funding has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

19. CANCELLATION: The Purchasing Division Director reserves the right to cancel this Contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The Purchasing Division Director may also cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-5.2.b.

20. TIME: Time is of the essence regarding all matters of time and performance in this Contract.

21. APPLICABLE LAW: This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, West Virginia Code, or West Virginia Code of State Rules is void and of no effect.

22. COMPLIANCE WITH LAWS: Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

23. ARBITRATION: Any references made to arbitration contained in this Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby deleted, void, and of no effect.

31. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

32. LICENSING: In accordance with West Virginia Code of State Rules § 148-1-6.1.e, Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Upon request, the Vendor must provide all necessary releases to obtain information to enable the Purchasing Division Director or the Agency to verify that the Vendor is licensed and in good standing with the above entities.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to be licensed, in good standing, and up-to-date on all state and local obligations as described in this section. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

33. ANTITRUST: In submitting a bid to, signing a contract with, or accepting a Award Document from any agency of the State of West Virginia, the Vendor agrees to convey, sell, assign, or transfer to the State of West Virginia all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to Vendor.

34. VENDOR NON-CONFLICT: Neither Vendor nor its representatives are permitted to have any interest, nor shall they acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Agency.

39. REPORTS: Vendor shall provide the Agency and/or the Purchasing Division with the following reports identified by a checked box below:

☑ Such reports as the Agency and/or the Purchasing Division may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by agency, etc.

☐ Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by agency. Quarterly reports should be delivered to the Purchasing Division via email at purchasing.division@wv.gov.

40. BACKGROUND CHECK: In accordance with W. Va. Code § 15-2D-3, the State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check. Service providers should contact the West Virginia Division of Protective Services by phone at (304) 558-9911 for more information.

41. PREFERENCE FOR USE OF DOMESTIC STEEL PRODUCTS: Except when authorized by the Director of the Purchasing Division pursuant to W. Va. Code § 5A-3-56, no contractor may use or supply steel products for a State Contract Project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W. Va. Code § 5A-3-56. As used in this section:

a. "State Contract Project" means any erection or construction of, or any addition to, alteration of or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of and materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after June 6, 2001.

b. "Steel Products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated or otherwise similarly processed, or processed by a combination of two or more or such operations, from steel made by the open heath, basic oxygen, electric furnace, Bessemer or other steel making process.

c. The Purchasing Division Director may, in writing, authorize the use of foreign steel products if:

   1. The cost for each contract item used does not exceed one tenth of one percent (.1%) of the total contract cost or two thousand five hundred dollars [redacted] whichever is greater. For the purposes of this section, the cost is the [redacted] steel product as delivered to the project; or

   2. The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

44. PROHIBITION AGAINST USED OR REFURBISHED: Unless expressly permitted in the solicitation published by the State, Vendor must provide new, unused commodities, and is prohibited from supplying used or refurbished commodities, in fulfilling its responsibilities under this Contract.

45. VOID CONTRACT CLAUSES: This Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.

46. ISRAEL BOYCOTT: Bidder understands and agrees that, pursuant to W. Va. Code § 5A-3-63, it is prohibited from engaging in a boycott of Israel during the term of this contract.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP OIG2600000001

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)

- [x] Addendum No. 1
- [ ] Addendum No. 2
- [ ] Addendum No. 3
- [ ] Addendum No. 4
- [ ] Addendum No. 5
- [ ] Addendum No. 6
- [ ] Addendum No. 7
- [ ] Addendum No. 8
- [ ] Addendum No. 9
- [ ] 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.

Column Case Management, LLC
Company

Tim Yaus
Authorized Signature

12/30/2025
Date

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

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

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

Column Case Management, LLC
(Company)

Tim Yario, President
(Representative Name, Title)

708-408-7715
(Contact Phone/Fax Number)

12/30/2025
(Date)

In implementing the prohibition under Public Law 115–232, section 889, subsection (f), paragraph (1), heads of executive agencies administering loan, grant, or subsidy programs shall prioritize available funding and technical support to assist affected businesses, institutions and organizations as is reasonably necessary for those affected entities to transition from covered communications equipment and services, to procure replacement equipment and services, and to ensure that communications service to users and customers is sustained.

State of West Virginia	Vendor Name:
By: ____________________	By: Column Case Management, LLC
Printed Name: ____________________	Printed Name: Tim Yario
Title: ____________________	Title: President
Date: ____________________	Date: 12/30/2025

EXHIBIT B To:
REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS (2 C.F.R. § 200.317):

Prevailing Wage Determination

[X] – Not Applicable Because Contract Not for Construction

[ ] – Federal Prevailing Wage Determination on Next Page

AGREED:

Name of Agency:____________________

Signature:____________________

Title:____________________

Date:____________________

Name of Vendor: Column Case Management, LLC

Signature: Tim Yance

Title: President

Date: 12/30/2025

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: OIG2600000001

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(Check the box next to each addendum received)

[x] Addendum No. 1	[ ] Addendum No. 6
[ ] Addendum No. 2	[ ] Addendum No. 7
[ ] Addendum No. 3	[ ] Addendum No. 8
[ ] Addendum No. 4	[ ] Addendum No. 9
[ ] Addendum No. 5	[ ] 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.

Column Case Management, LLC
Company

T.m Yeuell
Authorized Signature

12/30/2025
Date

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