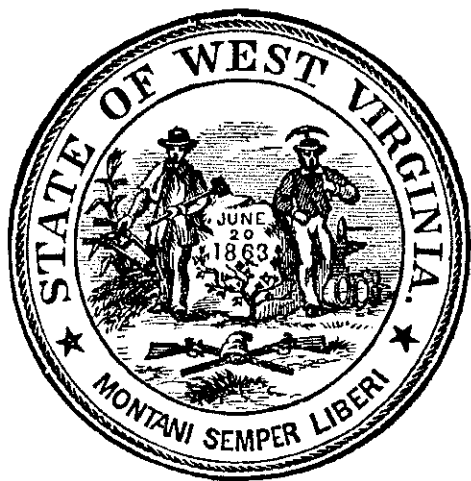




response

A Response to:  
**Request for Quotation  
For Document Imaging System and Client  
Management System  
RFQ Number CSE10015**



Presented To:

**State of West Virginia  
Department of Administration  
Purchasing Division**

Building 15  
2019 Washington Street East  
Charleston, WV 25305-0130  
Buyer: RW/File 22  
Bid Opening Date: 9/9/09  
Bid Opening Time: 1:30 pm

Prepared by:  
Northwoods Consulting Partners, Inc.  
5815 Wall Street  
Dublin, Ohio 43017



September 8, 2009

Original



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

# Request for Quotation

RFQ NUMBER  
**CSE10015**

PAGE  
**1**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER**  
**304-558-0067**

**Vendor**  
 Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

**Ship To**  
 HEALTH AND HUMAN RESOURCES  
 CHILD SUPPORT ENFORCEMENT  
 ROOM 147  
 350 CAPITOL STREET  
 CHARLESTON, WV  
 25301-3703 304-558-1649

DATE PRINTED 07/30/2009	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
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BID OPENING DATE 09/03/2009	BID OPENING TIME 01:30PM
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB	915-68	<p>*****            MANDATORY PRE-BID MEETING AUGUST 18, 2009 AT 1:30 PM            BUREAU OFFICES OF CHILD SUPPORT ENFORCEMENT,            350 CAPITOL STREET, CHARLESTON, WEST VIRGINIA 25301            *****</p> <p>OPEN END CONTRACT TO PROVIDE DOCUMENT IMAGING/CLIENT            REQUEST FOR QUOTATION</p> <p>TO PROVIDE ALL EQUIPMENT, SOFTWARE, INSTALLATION, AND            SUPPORT SERVICES TO CREATE AND INSTALL A DOCUMENT            IMAGING SYSTEM FOR THE BUREAU FOR CHILD SUPPORT            ENFORCEMENT STATEWIDE OFFICE AND TO CREATE AND INSTALL            A CLIENT MANAGEMENT SYSTEM TO ALLOW CUSTOMERS TO            ELECTRONICALLY ALERT STAFF TO THEIR ARRIVAL IN THE            WAITING AREA OF SPECIFIED DHHR/BCSE OFFICES PER THE            ATTACHED SPECIFICATIONS</p> <p>TERM OF THE AGREEMENT WILL BEGIN UPON AWARD AND            CONTINUE FOR A PERIOD OF ONE YEAR, WITH THE OPTION OF            TWO (2), ONE (1) YEAR RENEWALS NOTE: THIS WILL BE AN            OPEN END CONTRACT TO ALLOW OTHER DHHR AND/OR STATE            ENTITIES THE ABILITY TO UTILIZE THE CONTRACT. HOWEVER,            THE IMMEDIATE NEED FOR THE BCSE, AS DESCRIBED IN THE            SPECIFICATIONS, MUST BE COMPLETE BY SEPTEMBER 30, 2010</p>		

RECEIVED  
 2009 SEP -9 11:10:56  
 WV PURCHASING  
 DIVISION

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

**GENERAL TERMS & CONDITIONS  
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia
2. The State may accept or reject in part, or in whole, any bid
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee
5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30
6. Payment may only be made after the delivery and acceptance of goods or services
7. Interest may be paid for late payment in accordance with the *West Virginia Code*
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy"

---

**INSTRUCTIONS TO BIDDERS**

1. Use the quotation forms provided by the Purchasing Division
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications
3. Complete all sections of the quotation form
4. Unit prices shall prevail in case of discrepancy
5. All quotations are considered FOB destination unless alternate shipping terms are clearly identified in the quotation
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P O Box 50130, Charleston, WV 25305-0130



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

# Request for Quotation

RFQ NUMBER  
 CSE10015

PAGE  
 2

ADDRESS CORRESPONDENCE TO ATTENTION OF  
 ROBERTA WAGNER  
 304-558-0067

**VENDOR**  
 Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

**SHIP TO**  
 HEALTH AND HUMAN RESOURCES  
 CHILD SUPPORT ENFORCEMENT  
 ROOM 147  
 350 CAPITOL STREET  
 CHARLESTON, WV  
 25301-3703 304-558-1649

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
07/30/2009				

BID OPENING DATE: 09/03/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>THEY ARE UTILIZING STIMULUS DOLLARS FROM THE FEDERAL GOVERNMENT FOR THIS ACQUISITION AND THE USE OF THOSE DOLLARS ARE ONLY AVAILABLE UNTIL SEPTEMBER 30, 2010</p> <p>EXHIBIT 3</p> <p>LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON AWARD OF CONTRACT AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE</p> <p>UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT</p> <p>RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR, SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICES SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE \_\_\_\_\_ TELEPHONE \_\_\_\_\_ DATE \_\_\_\_\_

TITLE \_\_\_\_\_ FEIN \_\_\_\_\_ ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'





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

# Request for Quotation

RFQ NUMBER
CSE10015

PAGE
3

ADDRESS CORRESPONDENCE TO ATTENTION OF
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304-558-0067

**Vendor**  
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**SHIP TO**  
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 25301-3703 304-558-1649

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
07/30/2009				
BID OPENING DATE	09/03/2009	BID OPENING TIME		01:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. 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.</p> <p>ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM</p>						
REV 05/26/2009						

SIGNATURE		TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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

# Request for Quotation

RFQ NUMBER  
**CSE10015**

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**4**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER**  
**304-558-0067**

**VENDOR**  
 Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

**SHIP TO**  
 HEALTH AND HUMAN RESOURCES  
 CHILD SUPPORT ENFORCEMENT  
 ROOM 147  
 350 CAPITOL STREET  
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 25301-3703 304-558-1649

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
07/30/2009				
BID OPENING DATE: 09/03/2009		BID OPENING TIME 01:30PM		

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>INQUIRIES:            WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF            BUSINESS ON 8/19/2009 QUESTIONS MAY BE SENT            VIA USPS, FAX, COURIER, OR E-MAIL IN ORDER TO ASSURE            NO VENDOR RECEIVES AN UNFAIR ADVANTAGE, NO SUBSTANTIVE            QUESTIONS WILL BE ANSWERED ORALLY. IF POSSIBLE, E-MAIL            QUESTIONS ARE PREFERRED. ADDRESS INQUIRIES TO:</p> <p>ROBERTA WAGNER            DEPARTMENT OF ADMINISTRATION            PURCHASING DIVISION            2019 WASHINGTON STREET, EAST            CHARLESTON, WV 25311</p> <p>FAX: 304-558-4115            E-MAIL: ROBERTA A WAGNER@WV.GOV</p> <p>EXHIBIT 4</p> <p>LOCAL GOVERNMENT BODIES: UNLESS THE VENDOR INDICATES            IN THE BID HIS REFUSAL TO EXTEND THE PRICES, TERMS,            AND CONDITIONS OF THE BID TO COUNTY, SCHOOL, MUNICIPAL            AND OTHER LOCAL GOVERNMENT BODIES, THE BID SHALL EXTEN            TO POLITICAL SUBDIVISIONS OF THE STATE OF WEST            VIRGINIA. IF THE VENDOR DOES NOT WISH TO EXTEND THE            PRICES, TERMS, AND CONDITIONS OF THE BID TO ALL            POLITICAL SUBDIVISIONS OF THE STATE, THE VENDOR MUST            CLEARLY INDICATE SUCH REFUSAL IN HIS BID SUCH REFUSAL            SHALL NOT PREJUDICE THE AWARD OF THIS CONTRACT IN ANY</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
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State of West Virginia  
 Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

# Request for Quotation

RFQ NUMBER  
**CSE10015**

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**5**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER**  
**304-558-0067**

VENDOR

**Northwoods Consulting Partners**  
**5815 Wall Street**  
**Dublin, OH 43017**

SHIP TO

**HEALTH AND HUMAN RESOURCES**  
**CHILD SUPPORT ENFORCEMENT**  
**ROOM 147**  
**350 CAPITOL STREET**  
**CHARLESTON, WV**  
**25301-3703 304-558-1649**

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
07/30/2009				
BID OPENING DATE: 09/03/2009			BID OPENING TIME 01:30PM	

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>MANNER.</p> <p>REV 3/88</p> <p>THE MODEL/BRAND/SPECIFICATIONS NAMED HEREIN ESTABLISH THE ACCEPTABLE LEVEL OF QUALITY ONLY AND ARE NOT INTENDED TO REFLECT A PREFERENCE OR FAVOR ANY PARTICULAR BRAND OR VENDOR. VENDORS WHO ARE BIDDING ALTERNATES SHOULD SO STATE AND INCLUDE PERTINENT LITERATURE AND SPECIFICATIONS FAILURE TO PROVIDE INFORMATION FOR ANY ALTERNATES MAY BE GROUNDS FOR REJECTION OF THE BID. THE STATE RESERVES THE RIGHT TO WAIVE MINOR IRREGULARITIES IN BIDS OR SPECIFICATION IN ACCORDANCE WITH SECTION 148-1-4 (F) OF THE WEST VIRGINIA LEGISLATIVE RULES AND REGULATIONS.</p> <p>PURCHASING CARD ACCEPTANCE: THE STATE OF WEST VIRGINIA CURRENTLY UTILIZES A VISA PURCHASING CARD PROGRAM WHICH IS ISSUED THROUGH A BANK. THE SUCCESSFUL VENDOR MUST ACCEPT THE STATE OF WEST VIRGINIA VISA PURCHASING CARD FOR PAYMENT OF ALL ORDERS PLACED BY ANY STATE AGENCY AS A CONDITION OF AWARD</p> <p>MANDATORY PRE-BID</p> <p>A MANDATORY PRE-BID WILL BE HELD ON 8/18/2009 AT 1:30 PM IN BUREAU OFFICES OF CHILD SUPPORT ALL INTERESTED PARTIES ARE REQUIRED TO ATTEND THIS MEETING. FAILURE TO ATTEND THE MANDATORY PRE-BID SHALL RESULT IN DISQUALIFICATION OF THE BID. NO ONE PERSON MAY REPRESENT MORE THAN ONE BIDDER.</p> <p>AN ATTENDANCE SHEET WILL BE MADE AVAILABLE FOR ALL POTENTIAL BIDDERS TO COMPLETE. THIS WILL SERVE AS THE OFFICIAL DOCUMENT VERIFYING ATTENDANCE AT THE MANDATORY PRE-BID. FAILURE TO PROVIDE YOUR COMPANY AND REPRESENTATIVE NAME ON THE ATTENDANCE SHEET WILL RESULT IN DISQUALIFICATION OF THE BID. THE STATE WILL NOT ACCEPT ANY OTHER DOCUMENTATION TO VERIFY ATTENDANCE.</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

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

# Request for Quotation

RFQ NUMBER  
**CSE10015**

PAGE  
**6**

ADDRESS CORRESPONDENCE TO ATTENTION OF  
**ROBERTA WAGNER**  
**304-558-0067**

VENDOR

**Northwoods Consulting Partners**  
**5815 Wall Street**  
**Dublin, OH 43017**

SHIP TO

**HEALTH AND HUMAN RESOURCES**  
**CHILD SUPPORT ENFORCEMENT**  
**ROOM 147**  
**350 CAPITOL STREET**  
**CHARLESTON, WV**  
**25301-3703 304-558-1649**

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
07/30/2009				

BID OPENING DATE: **09/03/2009** BID OPENING TIME: **01:30PM**

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>THE BIDDER IS RESPONSIBLE FOR ENSURING THEY HAVE COMPLETED THE INFORMATION REQUIRED ON THE ATTENDANCE SHEET. THE PURCHASING DIVISION AND THE STATE AGENCY WILL NOT ASSUME ANY RESPONSIBILITY FOR A BIDDER-S FAILURE TO COMPLETE THE PRE-BID ATTENDANCE SHEET. IN ADDITION, WE REQUEST THAT ALL POTENTIAL BIDDERS INCLUD THEIR E-MAIL ADDRESS AND FAX NUMBER.</p> <p>ALL POTENTIAL BIDDERS ARE REQUESTED TO ARRIVE PRIOR TO THE STARTING TIME FOR THE PRE-BID. BIDDERS WHO ARRIVE LATE, BUT PRIOR TO THE DISMISSAL OF THE TECHNICAL PORTION OF THE PRE-BID WILL BE PERMITTED TO SIGN IN BIDDERS WHO ARRIVE AFTER CONCLUSION OF THE TECHNICAL PORTION OF THE PRE-BID, BUT DURING ANY SUBSEQUENT PART OF THE PRE-BID WILL NOT BE PERMITTED TO SIGN THE ATTENDANCE SHEET.</p> <p style="text-align: center;">NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p style="text-align: center;">DEPARTMENT OF ADMINISTRATION          PURCHASING DIVISION          BUILDING 15          2019 WASHINGTON STREET, EAST          CHARLESTON, WV 25305-0130</p> <p>PLEASE NOTE: 2 CONVENIENCE COPIES WOULD BE APPRECIATED.</p> <p>THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED:</p> <p>SEALED BID</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS.

SIGNATURE	TELEPHONE	DATE
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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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

# Request for Quotation

RFQ NUMBER  
**CSE10015**

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**7**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER**  
**304-558-0067**

VENDOR

**Northwoods Consulting Partners**  
**5815 Wall Street**  
**Dublin, OH 43017**

SHIP TO

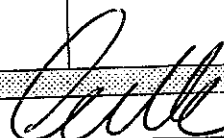
**HEALTH AND HUMAN RESOURCES**  
**CHILD SUPPORT ENFORCEMENT**  
**ROOM 147**  
**350 CAPITOL STREET**  
**CHARLESTON, WV**  
**25301-3703 304-558-1649**

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
07/30/2009				

BID OPENING DATE: **09/03/2009** BID OPENING TIME: **01:30PM**

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
BUYER: ----- RW/FILE 22 -----						
RFQ NO : ----- CSE10015 -----						
BID OPENING DATE: ----- 9/3/2009 -----						
BID OPENING TIME: ----- 1:30 PM -----						
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: ----- 614-781-7801 -----						
CONTACT PERSON (PLEASE PRINT CLEARLY): ----- Charles Wilson -----						
***** THIS IS THE END OF RFQ CSE10015 *****						TOTAL: <u>4,950,516.05</u>

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE:  TELEPHONE: **614-781-7800** DATE: **9-8-09**

TITLE: **President** FEIN: **31-1668570** ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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

# Request for Quotation

RFQ NUMBER  
**CSE10015**

PAGE  
**1**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER**  
**304-558-0067**

VENDOR

Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

SHIP TO

HEALTH AND HUMAN RESOURCES  
 CHILD SUPPORT ENFORCEMENT  
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 CHARLESTON, WV  
 25301-3703 304-558-1649

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/24/2009				

BID OPENING DATE: 09/03/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 1						
<p>1. QUESTIONS AND ANSWERS ARE ATTACHED.</p> <p>2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.</p> <p>EXHIBIT 10</p> <p style="text-align: center;">REQUISITION NO : CSE10015</p> <p>ADDENDUM ACKNOWLEDGEMENT</p> <p>I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.</p> <p>ADDENDUM NO. S:</p> <p>NO. 1 <input checked="" type="checkbox"/> . . . . .</p> <p>NO. 2 . . . . .</p> <p>NO. 3 . . . . .</p> <p>NO. 4 . . . . .</p> <p>NO. 5 . . . . .</p> <p>I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS.

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

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**GENERAL TERMS & CONDITIONS  
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

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6. Payment may only be made after the delivery and acceptance of goods or services
7. Interest may be paid for late payment in accordance with the *West Virginia Code*
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9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes
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11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract
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State of West Virginia  
 Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
 Post Office Box 50130  
 Charleston, WV 25305-0130

# Request for Quotation

RFQ NUMBER
CSE10015

PAGE
2

ADDRESS CORRESPONDENCE TO ATTENTION OF:
ROBERTA WAGNER 304-558-0067

VENDOR

Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

SHIP TO

HEALTH AND HUMAN RESOURCES  
 CHILD SUPPORT ENFORCEMENT  
 ROOM 147  
 350 CAPITOL STREET  
 CHARLESTON, WV  
 25301-3703 304-558-1649

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/24/2009				

BID OPENING DATE: 09/03/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>VENDOR MUST CLEARLY 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.</p> <p style="text-align: right;">             SIGNATURE            Northwoods Consulting Partners, Inc.            COMPANY            9-8-09            DATE         </p> <p>REV. 11/96</p> <p style="text-align: center;">END OF ADDENDUM NO. 1</p>						

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TITLE	FEN	ADDRESS CHANGES TO BE NOTED ABOVE

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

# Request for Quotation

RFQ NUMBER  
**CSE10015**

PAGE  
**3**

ADDRESS CORRESPONDENCE TO ATTENTION OF  
**ROBERTA WAGNER**  
**304-558-0067**

PROPERTY

Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

SHIP TO

HEALTH AND HUMAN RESOURCES  
 CHILD SUPPORT ENFORCEMENT  
 ROOM 147  
 350 CAPITOL STREET  
 CHARLESTON, WV  
 25301-3703 304-558-1649

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/26/2009				

BID OPENING DATE: 09/09/2009 BID OPENING TIME: 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	JB		915-68		
OPEN END CONTRACT TO PROVIDE DOCUMENT IMAGING/CLIENT						
***** THIS IS THE END OF RFQ CSE10015 ***** TOTAL:						<u>4,950,516.05</u>

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SIGNATURE 	TELEPHONE 614-781-7801	DATE 9-8-09
TITLE President	FEIN 31-1668570	ADDRESS CHANGES TO BE NOTED ABOVE

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State of West Virginia  
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 304-558-0067

VENDOR

Northwoods Consulting Partners  
 5815 Wall Street  
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BID OPENING DATE: ~~08/26/2009~~ 09/09/2009 BID OPENING TIME: 01:30PM

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 2						
1. TO REPLACE RESPONSES TO ITEMS 28, 35 & 73 OF ADDENDUM NO. 1, IN RESPONSE TO VENDOR QUESTIONS. 2. TO MOVE BID OPENING DATE FROM 9/3/2009 TO 9/9/2009 2. ADDENDUM ACKNOWLEDGEMENT IS ATTACHED THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN DISQUALIFICATION OF YOUR BID.						
EXHIBIT 10						
REQUISITION NO. : CSE10015						
ADDENDUM ACKNOWLEDGEMENT						
I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.						
ADDENDUM NO S:						
NO. 1 . . . . .						
NO. 2 ✓ . . . . .						
NO. 3 . . . . .						
NO. 4 . . . . .						
NO. 5 . . . . .						

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**GENERAL TERMS & CONDITIONS  
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia
2. The State may accept or reject in part, or in whole, any bid
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee
5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30
6. Payment may only be made after the delivery and acceptance of goods or services
7. Interest may be paid for late payment in accordance with the *West Virginia Code*
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract
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# Request for Quotation

RFQ NUMBER  
 CSE10015

PAGE  
 2

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
 ROBERTA WAGNER  
 304-558-0067

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Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

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HEALTH AND HUMAN RESOURCES  
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<p>I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.</p> <p>VENDOR MUST CLEARLY 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</p> <p style="text-align: center;">             SIGNATURE            Northwoods Consulting Partners, Inc            COMPANY            9-8-09            DATE         </p> <p>REV. 11/96</p> <p style="text-align: center;">END OF ADDENDUM NO. 2</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

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RFQ NUMBER:  
**CSE10015**

PAGE:  
**3**

ADDRESS CORRESPONDENCE TO ATTENTION OF:  
**ROBERTA WAGNER  
 304-558-0067**

NORTHWOODS CONSULTING PARTNERS

Northwoods Consulting Partners  
 5815 Wall Street  
 Dublin, OH 43017

SHIP TO

HEALTH AND HUMAN RESOURCES  
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	614-781-7800	9-8-09
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
President	31-1668570	

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



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## Trademark and Copyright Notice

The Compass Software® Suite and each of its products individually are owned exclusively by Northwoods Consulting Partners, Inc., and Northwoods hereby asserts its copyright and trademark rights to its products. Rather than repeat the trademark and copyright attributions throughout this document wherever a Northwoods' product name appears, Northwoods hereby asserts its intellectual property rights for all of its products.

Third party Trademarked and Copyrighted names also appear throughout this document. Rather than list the names and entities that own the trademark/copyright or insert a symbol with each mention of the trademark/copyright name, Northwoods states that it is using the names for editorial purposes and to the benefit of the trademark/copyright owner with no intention of infringing upon the trademark or copyright.



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# 1 Executive Summary

The pages to follow constitute the response from Northwoods Consulting Partners, Inc. (Northwoods) to RFQ Number CSE10015, "Request for Quote for Document Imaging / Client Management System" issued by the State of West Virginia on behalf of the West Virginia Department of Health and Human Resources (DHHR), Bureau for Child Support Enforcement (BCSE) on July 30, 2009. Northwoods has reviewed this RFQ and all of the desires, needs, qualifications and requirements, and we are confident that we can meet and exceed the expectations of BCSE. Northwoods is completely focused on your success as you undertake this initiative. We are committing highly experienced and talented resources to ensure that the system BCSE has envisioned will not only meet your needs, but will be a model for other departments within West Virginia and for other Child Support Agencies around the country.

***Our Vision:***  
*Northwoods will be nationally recognized as the pioneer in advanced automation for human services professionals.*

To propose a comprehensive document management and client management solution to the West Virginia BCSE requires careful consideration of the many characteristics that make BCSE and this RFQ unique. The statewide deployment of this solution within the timeframe available requires a software solution that has already been deployed in Child Support many times and that only needs to be configured for this implementation. There is not enough time or need for a custom development effort.

In addition, success will be dependent on a project team experienced in the technologies involved, Human Resources and Child Support generically, as well as West Virginia DHHR and BCSE specifically. An experienced team can focus its efforts on specific business process needs in BCSE like the availability of documents between agency locations across the state as clients move between counties. As with any large project that involves change, adoption of the solution by the workers in BCSE will be critical to the success of the project. Choosing a software product that meets the document management and client management requirements with a similar, intuitive user interface will significantly improve the adoption process and lower the stress to the staff. West Virginia BCSE offices will be receiving thousands of documents through the mail, in interviews, and from clients dropping them off at the front desk. To capture, organize, categorize, store and share this information in an electronic fashion efficiently and securely is a huge challenge not to be taken lightly. Finally, a comprehensive project plan is needed that accounts for implementing Phase 1 and Phase 2, allowing for time to evaluate and make any modifications to the pilot sites and complete the Phase 3 implementation by July 31, 2010.

Northwoods will meet these challenges head-on with experience and confidence gained from over 70 successful human services agency implementations nationwide as well as more than 25 Child Support implementations. With tens of thousands of combined hours of experience within human services, our company understands what it takes to successfully implement a project of this magnitude.



## Overview of Approach

### ***Document Management***

Northwoods recognizes that there are three key requirements for the document management system to be successful for BCSE. Those requirements are: simple, intuitive capture of all documents at the point of entry in the agency; access to documents between county offices with local storage for speed of retrieval; and integration to OSCAR so documents are available during normal daily worker activities.

The proposed Northwoods solution will allow BCSE to collect documents at the front desk, mail room, or worker areas with a very simple and intuitive capture screen. A worker simply enters a unique number, such as a social security number, and the remainder of the information is filled in automatically. The worker then picks a document group from a list of large, easy to read buttons (like "Medical") and click once. One more touch on the actual document type (like "National Medical Support Notice") and the document is pulled through the scanner and indexed. As the document is scanned, it is also placed in the document repository and is immediately available for viewing by all workers with the appropriate security levels. If there are other workers associated with the client, they will be notified in their electronic in-boxes that a new, scanned document has been received. The system provides BCSE with the option to print a receipt for the client as a worker hands the original document back. That receipt is stored in the system for future reference by BCSE.

Northwoods also proposes a Compass Self Check-in/Self Scan Kiosk for the lobby that empowers clients to scan their own documents with a secure, simple interface removing the worker from the scanning equation altogether. As with the first scanning option, once the client enters his or her social security number the system will know which worker(s) are associated with the client or case and route the new documents to their "Documents Received" queue. Through the simple capture process Northwoods is proposing, we will save workers thousands of hours, and BCSE will significantly reduce operating expenses.

Once the documents are stored in the Compass system, Northwoods proposes an interface to OSCAR that will allow a worker to double click on a screen and retrieve the documents associated with that client. This avoids the extra effort for the worker of opening a separate program and bouncing back and forth to try and utilize the documents needed to assist the client. This integration and simple retrieval method is a key to adoption by the workers and will help to combat their natural urge to revert to paper.

The solution that Northwoods has architected for BCSE includes an OnBase module from Hyland Software that supports the transfer of a copy of the documents from the local office to the central system for redundancy, security, document retention, and backup. This tool will also provide the ability for workers at one office to retrieve documents that were dropped off at other offices throughout the state.



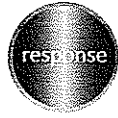
## ***Client Management***

Northwoods is proposing a Client Management system for the Phase 2 Pilot that has been installed for over 4 years for more than 40 clients. Our solution provides workers a comprehensive tool for managing their schedules, including client appointments, hearings, and onsite genetic testing. The solution provides supervisors with a true management tool to assist their workers and gain insight into where improvements can be affected. There are three major characteristics of the Client Management system Northwoods is proposing: a single interface for all scheduling; empowering and dignifying the client; and robust audit and management capabilities.

Northwoods' Client Management product, Compass Appointments will become the single scheduling tool for the workers. Not only will client appointments be loaded into the system, but department meetings, sick leave, vacations, lunch, holidays, and any other time blocks will be managed through the system as well. Our proposal includes the integration to Outlook so that appointments or blocks of time that have been entered on an Outlook calendar will also be added to the Client Management system. This allows the worker or supervisor to have a complete view of their calendar when scheduling an appointment. The system includes a front desk view that provides a front desk worker or supervisor with a simple, graphical view of all current appointments, scheduled appointments, waiting clients, and times that are associated with each.

Northwoods is recommending Compass Self Check-in/Self Scan Kiosks in the lobby for clients to check themselves in versus standing in a line at the front desk. Many clients are intimidated by the line and interaction with the front desk staff. The kiosk allows them to simply enter their social security number, confirm their name and appointment, and they are then presented with a receipt including a number. That number is how the workers refer to them when they come to the lobby to meet the client preserving their dignity and privacy by not using names. Once the client checks in, the worker and front desk are immediately notified of the presence of their client in the lobby. Not only does this empower the client, but it lowers the confusion at the front desk.

Compass Appointments will provide supervisors with a tool that provides them visibility to clients that have been waiting in the lobby past the agency's desired service times. Because of the escalation feature, a supervisor can take the appropriate action such as assigning another worker to the appointment or simply notifying the client that it may be a few more minutes. Supervisors also have the ability to schedule unit wide meetings and have them presented on all workers' schedules. When a worker is out sick or has to leave unexpectedly, the supervisor has a single view of all of the appointments associated with that worker, and they can also see who is available to be reassigned those appointments. The supervisory tools in the Client Management product are second to none in empowering supervisors to manage and improve the performance of their staff.



## **Project Team and Project Plan**

In meeting the expectations of DHHR and BCSE, it was important to focus on the project team and project plan. A technical solution is only as good as the way it is implemented. The State of West Virginia requires a skilled and highly experienced team to smoothly deliver the Document Imaging / Client Management solution throughout its statewide deployment.

Northwoods is committed to ensuring a successful implementation. We have assembled an experienced, knowledgeable team that we are confident will guarantee your success. The Northwoods project team includes project managers, product specialists from the Northwoods development team, implementation specialists and trainers that have worked in extensively social services, most of them with social services experience prior to working for Northwoods.

In addition, Northwoods has selected Deloitte Consulting, LLP (Deloitte) as a subcontractor to assist in the successful training, implementation and coordination of this project. We will incorporate a blend of Northwoods and Deloitte resources to provide West Virginia with an implementation that is well coordinated, of the highest quality, lowest risk, and overall leading value. Deloitte Consulting is a leader in Health and Human Services (HHS) solutions delivery for their clients nationally with an unparalleled track record. Additionally, West Virginia DHHR has been a valued partner of Deloitte in since 1994, including the successful design, development, and statewide implementation of both the RAPIDS and FACTS systems. We are pleased to bring them to this important effort.

## **Distinguishing Characteristics**

There are several factors that distinguish the Northwoods' response from proposals from other vendors. The Northwoods' proposal is provided by a vendor whose sole business is automating health and human services agencies. No other responding vendor can make that claim. No other vendor has more experience implementing document management solutions in a human services agency.

Northwoods' proposal is innovative. Innovation comes from advances in our Compass software, advances in our knowledge of enterprise infrastructure, and advances in project management and training methodology. Our approach to training is time tested and professionally delivered through the Northwoods Training and Documentation team. We do not train users on products. We train users on efficient business processes: how to manage incoming mail in the *new* process, how to set follow-up ticklers in the *new* process, and how to prepare for a hearing in the *new* process. We train them on how to effectively manage ever-growing caseloads with advanced automation so they can continue to provide (and improve) outstanding service to their clients.

Finally, the Northwoods proposal can be distinguished by its completeness. There are no hidden costs or unknowns. We have accounted for every piece of hardware, server and desktop operating system software, storage, switches...everything. Right down to the last cable and mouse. We accounted for training of every single worker. Great attention to detail has been





given to this response so BCSE can feel confident in its accuracy and completeness in addressing your needs. We have not excluded or misrepresented any of the requested requirements. After reviewing your requirements, we have priced our response to meet all aspects of the RFQ.

Moreover, we believe that we can offer suggestions based on our experience that may allow you to retain the desired functionality while lowering the cost of the solution. We would be happy to share our thoughts if we are fortunate enough to be chosen to work with DHHR/BCSE.

We would welcome the opportunity to meet with BCSE and demonstrate the power of Compass Software. We also invite BCSE to visit our corporate headquarters in Dublin, a suburb of Columbus, Ohio, to observe our organization first hand.



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## 2 Vendor Requirements

### 2.1 Vendor Experience/Capabilities

#### **Mandatory Requirement 1:**

Vendor must have been in business at least five (5) years and have at least five (5) years of successful experience installing and supporting scanning equipment with 2 years experience in the Human Services and/or Child Support field.

Both Northwoods and Deloitte meet and exceed the experience and capabilities desired by DHHR/BCSE.

Northwoods Consulting Partners, Inc., (Northwoods) founded in 1997, is a privately-held software development and services company headquartered in Dublin, Ohio, a suburb of Columbus. The Northwoods organization employs over 70 employees, many directly from health and human services agencies. Our core competency is in the area of implementing electronic document imaging and client flow solutions in health and human services agencies. With over 10 years of business experience, over 6 years of successful experience installing and supporting scanning equipment in health and human services agencies, and over 25 child support document management installations, Northwoods is uniquely qualified to meet this requirement.

Northwoods is a customer-driven organization providing software and services. We offer our customers a full suite of commercial-off-the-shelf (COTS) software solutions including client scheduling and wait line management, electronic document management, electronic forms and workflow solutions. Additionally, Northwoods offers consulting services that enable us to address our customers' unique business needs with technology and to seamlessly integrate these new technologies with existing systems to maximize our customer's overall investment and shorten the time to realize a return on investment and control cost.

Deloitte has more than 40 years of experience helping states implement and manage the complex health and human services (HHS) programs that protect and promote the health, safety and well-being of citizens. Services and solutions span HHS programs, including:

- Temporary Assistance for Needy Families (TANF)
- Food Stamps (SNAP)
- Medicaid
- Women, Infants and Children (WIC)
- Workforce Investment Act (WIA)
- Child Welfare
- Child Support



### 2.1.1 The Northwoods Difference

Child Support agencies have unique processes, quite unlike those of other agencies. As specialists in the health and human services marketplace, Northwoods employees understand the challenges that agencies face managing information and communicating among staff as well as between locations and across the state. In order to solve these very specific challenges, our out-of-the-box Compass software applications are highly configurable allowing us to meet BCSE's specific needs. Right off the shelf our software is designed to work the way your case workers and supervisors work today. But it also provides plenty of flexibility to configure processes specific to BCSE for even greater productivity gains. With the experience gathered through implementations in various types of health and human services agencies in several states, Northwoods has the knowledge and the software to help agencies improve their business processes

Compass Software solutions help child support enforcement agencies save time and money by addressing the everyday needs of case workers and other agency employees. The business automation available within Compass has helped our child support enforcement customers meet federal performance goals. These business automation tools allow agencies to automate processes like the paternity and support establishment processes, legal referrals, review and adjustment, and emancipations just to name a few

Meeting or exceeding federal performance standards is more of an art than a science and takes many different tools. The automation of business processes within Compass is one of the primary tools used to position agencies and states for improved performance. One county in Ohio has seen a 5% increase in the support establishment, paternity establishment, and collection on arrears categories. In addition, the automation of business processes provides the tracking and reporting necessary to monitor progress. Compass Software can help standardize and automate processes centered on collection activities.

As much as we are in the software business, we are in the people business. We strive to attract and retain only the best team players, and it is working. Our customers tell us that our attitude toward quality and service is a refreshing departure from today's norm. Our team continues to grow with employees certified in a wide array of the latest technologies. We bring you over 350,000 man-hours of expertise in project management, document imaging and warehousing, network engineering and security, application development, and database implementation and administration. The members of the Northwoods team have over 300 years combined experience in health and human services.

### 2.1.2 The Northwoods Team

At Northwoods, we make great software, but it's our people who make the real difference. We come from many different backgrounds, but share a belief that any job worth doing is worth doing well. Many Northwoodians worked in health and human services before joining the team and have an intimate knowledge of the programs agencies administer and the processes they use



Northwoods designates a project manager for all projects to provide the agency with a single point of contact for all project issues. In addition to the project manager, Northwoods supplies an appropriate team of knowledgeable employees to facilitate a successful project. For BCSE we will also be adding an Executive Sponsor to insure the proper level of communication and oversight.

The following people are representative of the caliber of individuals that make up the Northwoods team.

**Greg Tipping, Chief Operating Officer** – As a former IM Administrator and front line case worker, Greg brings a wealth of social services knowledge and experience to the Northwoods team. Greg has led, sponsored or participated in, the implementation of the Northwoods Suite of products in over 40 of our county social services customers in Ohio, North Carolina and California. Greg's vast experience in managing people and multiple projects simultaneously has proven invaluable as Northwoods' grows into multiple states.

**Aaron Caldwell, Manager of Engineering Services** – Aaron has been with Northwoods for over four years. In that time, Aaron has served as a Project Support Specialist, Systems Engineer, Workflow Engineer, and Project Manager. Aaron was instrumental in helping design the standard workflow processes that Northwoods configured for social services agencies and has implemented those standard workflow processes in over 15 counties. As Manager of Engineering Services, Aaron manages the System Engineers, who are responsible for installation and configuration of Compass and system software used by Northwoods' customers.

**Mark Kaple, Manager of Field Operations** – Mark has worked at Northwoods since October, 2005 and has over 15 years of project management and technical support experience, specializing in the integration of complex, cross-functional projects. As a project management professional, business coach and certified trainer, he has collaborated with executive management teams while leading projects in commercial and government organizations totaling more than \$25 million. Since joining Northwoods, he has participated in 30+ projects in human services agencies. In his current position, he provides oversight to the project management team and ensures all projects are managed in a standardized and successful manner. Mark holds a Master of Business Administration (MBA) degree and is a certified Project Management Professional (PMP).

**Chawn Walker, Senior Project Manager** – As a former employee at an Ohio metro human services agency, Chawn brings a unique perspective to client flow management within human services agencies, as well as intimate knowledge of the problems that manual client flow management and appointment tracking can cause. Chawn has been with Northwoods for over 4 years, and in that time has lead many Compass Appointment implementations, including our largest implementation at Sacramento County. Chawn is a certified Project Management Professional (PMP).



**Andrew Bahnsen, Business Analyst** – Andrew has 14 years of experience in the Information Technology field. His experience includes Information Technology Manager for County Government as well as Systems Administrator in the commercial sector. Andrew has applied this experience in implementing the Northwoods' solution at various counties throughout Ohio, including Delaware Child Support Enforcement Agency, Geauga Job and Family Services, and Marion Child Support Enforcement Agency.

**Nancy Miller, System Engineer** – Nancy has six years experience as a Case Manager in Social Services. She has working knowledge in all aspects of caseload management and all public assistance case types. Currently Nancy is a Systems Engineer with the Engineering Team. She is the Lead Engineer for all new site rollouts, installation of all hardware and installation and configuration of RightFax and server related software.

**Natalie Blue, Director of Business Development** – *As a former Child Support Administrator* in a combined agency, Natalie brings 15 years Child Support knowledge and six years of human services knowledge to the Northwoods team. While working at a local agency she served on the Ohio Child Support Associations Executive Board and on many state committees to improve policy and technology for Child Support agencies. Natalie has participated and lead project implementations at Northwoods. Currently, the Director of Business Development, Natalie establishes and maintains partnerships with customers, associations, and state level staff and promotes the sales of the Compass Software Suite of products.

**Rick Dorman, Deloitte Consulting, LLP Principal, State of West Virginia Lead Client Partner (LCP)** – Rick is a Principal of Deloitte Consulting LLP's State Government Practice with 24 years of Information Technology Consulting Experience including over 20 years of delivering successful large-scale Health and Human services projects in nine states. Rick has extensive experience in automating public assistance, transitional assistance and child welfare programs, including involvement in the design, development, and implementation projects for large-scale welfare systems in six States (Florida, Ohio, Indiana, West Virginia, New Hampshire and Texas), and FACTS in West Virginia. Rick led the original development and implementation of RAPIDS and has overseen the successful operation of the project for DHHR for nearly 15 years.

### 2.1.3 Products

With extremely high case loads and staff turnover, health and human services agencies are burdened to do more with less. Our applications allow agency staff to spend more time focusing on clients needs, and less time shuffling and searching for information. Northwoods Compass Software® provides agencies with electronic document management, front desk scanning, electronic forms, scheduling, and other service-enhancing solutions.



Although not all modules are included in this response, the full Compass suite comprises the following modules:

- **Compass Capture** – Desktop and Scan Stations at the front desk, mail room, and workers’ desks
- **Document Management** – Retrieval through our interface or the OnBase client, including folders, custom queries, line-of-business integration
- **Compass Workflow** – Automating processes that have significant impact to the client and agency
- **Compass Forms** – Simplifying the forms process during interviews and significantly lowering agency cost
- **Compass People** – A data store with some aspects of a case management system but used to feed Compass Pilot
- **Compass Pilot** – Puts all of the case manager’s most used tools in one interface
- **Compass Appointments** – Scheduling system to manage all of the agency’s clients and human resources
- **Compass Appointments Check-in Kiosk** – For appointments
- **Compass Self-Scan Kiosk** – For continued modernization
- **Compass Balance** – To assist the managers and formalize the process of creating equitable case loads among workers
- **Case Banking Support** – For modernization efforts
- **Call Center** – For modernization efforts

Northwoods technological solutions work with existing state systems, like OSCAR to help agency workers do their jobs more quickly and efficiently. Our software and systems help smooth the process from application through collection, and provide instant access to client information for follow-up.

#### 2.1.4 Professional Services

Northwoods Professional Services provide the experience and technical knowledge to get your document management and client management project up, running, and keep it running, at peak efficiency. Our staff includes former health and human services professionals who understand how child support agencies work, as well as project managers, technical and engineering staff, trainers, and support specialists.

- Project Management by PMI-certified professionals
- Health and Human Services Best Practices Consulting
- Health and Human Services Business Process Analysis
- Professional Implementation
- Professional End-User Training for Case Managers, Supervisors, Front Desk Workers and others
- Professional Technical Training for Health and Human Services IT staff
- Maintenance
- Support





Our experience with child support agencies in several states puts us in a position to help determine best practices. We know what has worked in the past and what hasn't. We will review the needs of BCSE to confirm the best approach for you and work to create the best solution we can for each challenge.

Our services begin behind the scenes while we form the project team, discuss the project and formulate a plan to achieve optimal results with minimal disruption to each location, as well as the state's BCSE IT staff. During discovery, our team will meet with both state and local staff to examine business practices and determine the best solution and configuration for the agency's specific situation. We will duplicate this process at each of the pilot locations to validate our understanding from the last location. Following discovery, the Northwoods team, working with you, proceeds with installation, testing, training and rollout of the solution to agency employees, and then moves into ongoing support for that location. Northwoods uses industry-standard project management principles throughout the project lifecycle.

Northwoods Professional Services will be augmented by our subcontractor Deloitte through the completion of the project. We carefully selected Deloitte to assist us with this effort because of their expertise in HHS systems implementations and their longstanding successful partnership with DHHR.

### 2.1.5 Current Customers

Northwoods has helped case workers at health and human services agencies nationwide make their jobs less stressful by providing instant access to case documents from the desktop, reducing workplace clutter by eliminating the need to keep volumes of case files in offices, facilitating communication with front desk and other staff, and making client interviews more effective and less time consuming.

Our current customer list demonstrates our focus in Human Services

- Adams County Dept of Job & Family Services, OH
- Alamance County Dept of Social Services, NC
- Allen County Dept of Job & Family Services, OH
- Auglaize County Dept of Job & Family Services, OH
- Blue Earth County Human Services Agency, MN
- Cabarrus County Dept of Social Services, NC
- Carver County Dept of Social Services, MN
- Chemung County Dept of Social Services, NY
- Clark County Dept of Job & Family Services, OH
- Cleveland County Dept of Social Services, NC
- Crawford County Dept of Job & Family Services, OH
- Cuyahoga County Dept of Employment & Family Serv, OH
- Cuyahoga County Dept of Children & Family Services, OH
- Dakota County Employment & Economic Assistance, MN
- Davie County Dept of Social Services, NC
- Delaware County Child Support Enforcement Agency, OH
- Delaware County Dept of Job & Family Services, OH
- Macon County Dept of Social Services, NC
- Madison County Dept of Job & Family Services, OH
- Madison County Dept of Social Services, NY
- Mahoning County Dept of Job & Family Services, OH
- Marion County Dept of Job & Family Services, OH
- Mecklenburg County Dept of Social Services, NC
- Medina County Child Support Enforcement Agency, OH
- Medina County Dept of Job & Family Services, OH
- Meigs County Dept of Job & Family Services, OH
- Mercer County Dept of Job & Family Services, OH
- Montgomery County Dept of Job & Family Services, OH
- Moore County Dept of Social Services, NC
- Morrow County Dept of Job & Family Services, OH
- Muskingum County Dept of Job & Family Services, OH
- Orange County Dept of Social Services, NC
- Perry County Dept of Job & Family Services, OH
- Pickaway County Dept of Job & Family Services, OH



- Fairfield County Dept of Job & Family Services, OH
- Franklin County Dept of Job & Family Services, OH
- Franklin County Public Children Services Agency, OH
- Fulton County Dept of Job & Family Services, OH
- Gallia County Dept of Job & Family Services, OH
- Gaston County Dept of Social Services, NC
- Geauga County Dept of Job & Family Services, OH
- Hancock County Dept of Job & Family Services, OH
- Highland County Dept of Job & Family Services, OH
- Jackson County Dept of Job & Family Services, OH
- Knox County Dept of Job & Family Services, OH
- Lake County Dept of Job & Family Services, OH
- Lawrence County Dept of Job & Family Service, OH
- Licking County Child Support Enforcement Agency, OH
- Licking County Dept of Job & Family Services, OH
- Livingston County Dept of Social Services, NY
- Logan County Child Support Enforcement Agency, OH
- Logan County Dept of Job & Family Services, OH
- Lucas County Dept of Job & Family Services, OH
- Pike County Dept of Job & Family Services, OH
- Preble County Dept of Job & Family Services, OH
- Robeson County Dept of Social Services, NC
- Richland County Children Services Board, OH
- Sacramento County Dept of Human Assistance, CA
- San Joaquin County Human Services Agency, CA
- San Mateo County Human Services Agency, CA
- Sandusky County Dept of Job & Family Services, OH
- Scioto County Dept of Job & Family Services, OH
- Shelby County Dept of Job & Family Services, OH
- St. Louis County Dept of Social Services, MN
- Stark County Child Support Enforcement Agency, OH
- Stark County Dept of Job & Family Services, OH
- Transylvania County Dept of Social Services, NC
- Warren County Child Support Enforcement Agency, OH
- Wayne County Dept of Job & Family Services, OH
- Wayne County Public Children Services Agency, OH
- Wood County Dept of Job & Family Services, OH
- Yadkin County Dept of Social Services, NC

The best way to demonstrate our experience and capabilities is to let our past projects speak for themselves.

### ***Montgomery County Child Support Enforcement Agency, Ohio***

The Montgomery County Department of Job and Family Services (DJFS) located in southwest Ohio, is a triple-combined agency that oversees public assistance, child support and children services for a population of over one half million citizens. The Montgomery County Child Support Enforcement Agency (CSEA), which is a division of the Department of Job and Family Services works to provide the county's children with the opportunity for a better life by assisting with family self-sufficiency. Each day Child Support professionals interact with employers, insurance providers, courts, law enforcement, other government agencies, and parents to establish and enforce support orders to help children receive the financial and medical support they need.

In 2007, Montgomery CSEA chose to implement Northwoods' full suite of Document Imaging and Client Management solutions. This solution provides several key functionality gains, including allowing the agency to scan incoming mail at its point of entry with Compass Capture software and make it immediately available to case workers and others throughout the agency. Streamlined completion of electronic forms, with Compass Forms, helps case workers do their work fast and accurately. In addition, Compass Appointments is used by the agency to serve walk-in clients quickly and to improve communication between the front desk, case workers, and supervisors.

A backlog of four months of orders that had not been entered into the system generated lots of phone calls and duplicate mail. Clients couldn't get good answers about the status of their case.



so they would send the documentation again. Without a system to let them know what documentation already existed, workers would process the mail twice, or even three times. Although caseloads are currently higher than they were a year ago, the amount of mail has been reduced by 50%. At one point after the implementation, supervisors called the post office asking them if they knew the whereabouts of the rest of their mail. The system created standards, structure, and order where it did not exist prior. It demanded accountability. Despite the new "structure," 100% of the workers at the CSEA soon embraced the system enthusiastically, because they could see it dramatically cut down their workload.

Case workers at the agency no longer have to wait 4–24 hours to receive a file from the records room. Electronic retrieval is instantaneous, saving on court preparation time and allowing Call Center employees to answer inquiries immediately in most cases.

Northwoods automated a number of business processes for the agency that reduce paper flow and increase efficiency:

- Call Center/SFRC Referrals — Helps the Call Center handle client phone inquiries by allowing workers to complete an e-form and route it to a specific unit or worker, instead of by printing the request and sending it by internal mail to the appropriate person or persons.
- 7001 Legal Referrals — Lets workers track the progress of legal referrals throughout the process.
- PSU Referrals — Helps the Payment Summary Unit (PSU) manage all new/modified court order, which arrive at the rate of 100-150 per day. The PSU Referral process also handles internal referrals from the Call Center when a client phones and has a payment question the Call Center worker cannot answer. These referrals are all handled electronically.
- Modification (Review and Adjustments) Process — Tracks both automatic reviews of cases and those requested by a parent. Each review determines if an adjustment/modification is needed to the court-ordered support order.
- Electronic mail delivery — Documents received at the front desk, through the mail, or elsewhere in the agency can be routed to the worker or group of workers that need to act on them.

With a general reduction in printing taking place, the agency is no longer replacing printers as they wear out, but consolidating on group printers. The CSEA is also experiencing savings on toner and other printer consumables. Where the agency used to keep shelves of blank forms throughout the work areas to provide easy access for workers, they now are able to reclaim space, since forms are now housed online. And since case workers no longer need to keep stacks of files on hand, workspaces are more organized and tidy in general.

"Since installing the Northwoods solution, the overall caseload is up at the agency about 3,000 to 4,000 cases for a total of 68,000," said Ms. Swartztrauber. "We've been able to absorb additional cases without adding staff."



### ***Stark County Child Support Enforcement Agency, Ohio***

The Stark County Child Support Enforcement Agency (CSEA), a division of the Stark County Job and Family Services in Northeast Ohio is dedicated to providing quality services that assist in supporting children and families. Stark CSEA managed a caseload of 33,300 and collected \$65,201,505 in child support in 2008.

Stark County Job and Family Services which also manages TANF, Medicaid, SNAP, Workforce, and Child Welfare programs, purchased the Compass Suite of products for all of the program areas within the agency. Stark County CSEA began their implementation of the Northwoods Compass Suite of products in 2006 after the implementation in the public assistance areas. The CSEA division implemented document management, forms, and workflow functionality.

Stark County CSEA was the first county using Compass to automate the review and adjustment business process. Prior to the automation, the agency was experiencing a backlog of review requests. In addition, the agency was manually tracking the progress of a case through the process. Shortly after automating the process using workflow, the agency was able to eliminate their backlog and the manual tracking. The manual tracking and reporting provided significant time savings to the three member team and the unit supervisor. The agency also realized a reduction of alerts as the backlog of review requests was reduced. Other business automation included electronic mail delivery, automated follow-up, and the automation of the termination process.

The automation of business processes and the availability of documents at the click of a button dramatically improved agency communication. The capture of documents at the point of entry reduced the need for clerical staff to file. The agency has also experienced a 5% increase in performance for the support establishment federal performance measure. The agency has benefited tremendously from the automation and the standardization of procedures.

"Northwoods document imaging system has been a good investment for our agency during these tight economic times, and it is an investment which will help our agency for many, many years into the future," said Rob Pierson, Stark County CSEA Director

### ***San Joaquin County Human Services, California***

San Joaquin County Human Services in Stockton California partnered with Northwoods to improve the efficiency of their lobby and create a better experience for clients coming into the agency. Prior to the Northwoods solution, clients waited in long lines before approaching one of 20 reception windows to receive services. Average wait times approached 60 minutes for simple document drop-off services.

The goal of the Northwoods project was to allow clients to check-in at a self service kiosk, indicate their reason for visiting the agency and be directed to the appropriate window based on the type of service they were requesting. Now once they have checked in at a self service kiosk, clients can have a seat in the lobby and wait comfortably until their number is displayed



on an overhead LCD display in the lobby. Clients with small children appreciate the ability to check in within a few seconds and then have a seat in the lobby until their number is called.

“Compass Appointments adds tools that help eligibility workers be more responsive to clients. Before the system was in place, we were receiving 50 to 75 complaint calls a month due to long waits and slow responses to client requests. Now, we receive only one or two complaints a week,” a manager in the Income Maintenance Bureau reported.

Not only has the Compass Appointments solution improved the experience for clients in San Joaquin; it has provided valuable information to the management team there. Today the executive team is armed with myriad reports and metrics that can be used to forecast client arrival rates and make better staffing decisions. Rather than being in a constant reactive mode, the staff there can predict when they are likely to need additional staffing to meet the needs of their clients.

### ***Lucas County Department of Job and Family Services, Ohio***

Lucas County Department of Job and Family Services (DJFS), located in Northwest Ohio, provides services such as temporary cash assistance, food stamps and Medicaid, subsidized child care, adult protection, disability assistance and Prevention, Retention and Contingency Services to a population of approximately one-half million citizens.

Lucas County DJFS was one of the first metropolitan counties to use Northwoods products and services. Before the Northwoods partnership, five front desk workers did their best to get people where they needed to be within 30 minutes of their arrival at the agency. Today, the average wait is 12 minutes, and three of the workers have been freed up for other duties. Compass Appointments handles all appointment scheduling, tracks how long clients are waiting, and helps check-in and assign walk-in clients to an appropriate worker. It is considered the traffic cop between the lobby and the case workers in the agency.

“We’ve come a long way since beginning our partnership with Northwoods,” said Mario Faz, former Information Services Director, Lucas County Department of Job and Family Services. “The Compass Appointments system drives our business, so it’s a good thing it’s so reliable. We’ve only been down for maybe five minutes since we started in early 2004.”

In addition to Appointments, Lucas County DJFS implemented Compass Capture, Compass Forms and Electronic Document Management with Workflow improving their client’s experience from the time they walk in the door through the end of their appointment. Dual monitors allow the case worker and the applicant to see the same documents simultaneously. The applicant can see what the case worker is typing as they complete forms on the screen. The client uses an electronic signature pad to sign the forms, reducing the need to print and copy documents. When the forms are complete, they are automatically deposited in the document image repository. The result is a quicker, more efficient appointment.



### ***Marion County Job and Family Services, Ohio***

Marion County Job and Family Services, located central Ohio was outgrowing storage space for the large volume of paper it generated in the delivery of its services. The agency realized it could gain maximum benefit by replacing its paper based processes with an electronic document management system. In addition, the agency found that it needed a better way to process and manage information throughout departments

Northwoods recommended Compass, a software solution that combines electronic document management, document imaging, reception and mail scanning, and automated electronic forms technology. The goal was to streamline operations by providing a more efficient means to capture, store, manage, retrieve and distribute information

"The Northwoods team was interested in what we did and how we did it," says Roxane Somerlot, Marion County Job and Family Services Director "This was the first time in a long time that we looked at our operations to see if there was a better way to do things."

Using Northwood's suite of products, documents are captured electronically by case workers and reception staff and stored in the electronic document management repository for retrieval. Once captured, any part of the electronic file is immediately available to any personnel throughout the agency through the electronic document management system or seamlessly through the state's mainframe system. The staff can double-click in the CRIS-e environment to automatically retrieve data that is digitally stored in the centralized electronic repository. Information is automatically routed across business processes and delivered to clients, staff and decision-makers when they need it. Once retrieved, the Compass Document Management solution allows staff to e-mail or fax a record directly from the system.

"Caseworkers love the new system," says Chuck Simpson, Income Maintenance Administrator "It puts the information they need right at their fingertips. And it doesn't drastically change the way they work."

Within a year of implementing the Compass solution, Marion County realized staff savings of \$220,000 and a 37% increase in case worker capacity. The county agency has also experienced these additional benefits:

- Elimination of off-site storage needs
- More responsive client service
- Improved organizational efficiency
- Standardization of processes

"Without the Northwoods solution, our agency would be in dire straits," says Ms. Somerlot.



### ***Yadkin County Department of Social Services, North Carolina***

Eddie Wooten, Director of the Yadkin County Department of Social Services (DSS) in North Carolina, had a problem. His agency was running short on space and needed to hire more staff to keep up with the increasing demand from the county's residents.

"We were running out of storage space for files, plus we needed to add staff and didn't have any room for them," he said.

After evaluating other solutions, Yadkin County DSS chose Northwoods because of the effectiveness of its software in other counties and the customer service provided.

"Northwoods is the most customer-friendly and easiest-to-use solution we found," said Mr. Wooten "What swayed us to buy from Northwoods is that the feedback we received from agencies with other solutions was not nearly as positive as what we received from agencies with Northwoods "

Yadkin County DSS chose to add Compass Capture to provide distributed scanning of documents at the point of entry into the agency, Compass Forms to provide quick and easy completion of electronic forms and Compass Appointments to help the agency keep up with individual schedules and case worker availability. In addition, they also implemented a new product called Compass Pilot that provides a front end to their Electronic Document Management System.

After less than a year, the Northwoods solution was paying off in Yadkin County. Paper usage is down 50% so far, due to the elimination of the need to make copies of all forms and support documentation dropped off at the agency. Case reviews now only take about 10 minutes, down from 20-30 before Northwoods.



## 2.2 Customer References – Document Imaging

### Mandatory Requirement 2:

Vendor must provide three references from current business clients who scan a minimum of 15,000 documents per year and provide a description of the services furnished to the client.

Northwoods meets and exceeds this requirement. We currently have 70 human services customers that scan at least 15,000 or more per year. Additional contact information can be provided upon request.

<b>Customer Name:</b>	Fairfield County Department of Job and Family Services (combined agency)
<b>Address:</b>	239 West Main Street, Lancaster, Ohio 43130
<b>Contact Person:</b>	Corey B. Clark, Director, Child Support Enforcement Agency
<b>Phone Number:</b>	(740) 687-6788
<b>Fax Number:</b>	(740) 687-6787
<b>Email Address:</b>	clarkc03@odjfs.state.oh.us
<b>Scanned Documents:</b>	2007: 18,056 2008: 50,437
<b>Services Provided:</b>	Provided installation, implementation, training and support services for electronic document management, electronic forms management and work process management. Current maintenance customer.

<b>Customer Name:</b>	Pickaway County Department of Job and Family Services
<b>Address:</b>	110 Island Road, Circleville, OH 43113
<b>Contact Person:</b>	Jana Reisinger
<b>Phone Number:</b>	(740) 474-7588 ext. 290
<b>Fax Number:</b>	(740) 477-1023
<b>Email Address:</b>	reisij@odjfs.state.oh.us
<b>Scanned Documents:</b>	2007: 200,830 2008: 200,771
<b>Services Provided:</b>	Provided installation, implementation, training and support services for electronic document management and electronic forms management. Current maintenance customer.

<b>Customer Name:</b>	Stark County Child Support Enforcement Agency
<b>Address:</b>	116 Cleveland Avenue NW, Canton, Ohio 44701
<b>Contact Person:</b>	Rob Pierson, Director
<b>Phone Number:</b>	(330) 451-8000
<b>Fax Number:</b>	(330) 451-8924
<b>Email Address:</b>	piersr01@odjfs.state.oh.us
<b>Scanned Documents:</b>	2007: 202,728 2008: 166,424
<b>Services Provided:</b>	Provided installation, implementation, training and support services for electronic document management, electronic forms management and work process management. Current maintenance customer.





## 2.3 Customer References – Client Management

### **Mandatory Requirement 3:**

Vendor must have installed a client management system similar to the specifications contained herein for at least three clients within the past five (5) years.

Northwoods meets and exceeds this requirement. We currently have 30 human services customers that have installed the Compass client management solution. Additional contact information can be provided upon request.

<b>Customer Name:</b>	Clark County Department of Job and Family Services (combined agency)
<b>Address:</b>	1345 Lagonda Avenue, Springfield, Ohio 45501-1037
<b>Contact Person:</b>	Dan Howard,
<b>Phone Number:</b>	(937) 327-1700
<b>Fax Number:</b>	(937) 327-3715
<b>Email Address:</b>	dhoward@clarkdjfs.org
<b>Services Provided:</b>	Provided installation, implementation, training and support services for electronic document management, electronic forms management, work process management and client flow management. Current maintenance customer

<b>Customer Name:</b>	Lake County Department of Job and Family Services (combined agency)
<b>Address:</b>	177 Main Street, Painesville, Ohio 44077-9967
<b>Contact Person:</b>	Matthew Battiato, Director
<b>Phone Number:</b>	(330) 451-8000
<b>Fax Number:</b>	(330) 451-8924
<b>Email Address:</b>	battim@odjfs.state.oh.us
<b>Services Provided:</b>	Provided installation, implementation, training and support services for electronic document management, electronic forms management, work process management and client flow management. Current maintenance customer

<b>Customer Name:</b>	Montgomery County Department of Job and Family Services (combined agency)
<b>Address:</b>	14 W. Fourth Street, Dayton, Ohio 45401
<b>Contact Person:</b>	Shelly Swartztrauber, Division Administrator, Child Support Enforcement Agency
<b>Phone Number:</b>	(937) 225-4148
<b>Fax Number:</b>	(937) 225-6203
<b>Email Address:</b>	swarts@odjfs.state.oh.us
<b>Scanned Documents:</b>	2008: 3,883,401
<b>Services Provided:</b>	Provided installation, implementation, training and support services for electronic document management, electronic forms management, work process management and client flow management. Current maintenance customer.



### 3 Functional Requirements

#### Requirements for the Document Imaging System:

Item	Description	Vendor will provide. Yes/No
1	The system shall allow for the capture and scanning of documents at their point of entry into each individual DHHR office. The distributed scanning process must allow for scanning, indexing and quality control of images in a single step. The vendor shall be responsible for designing the system, purchasing the appropriate equipment to operate the system, and customizing the software as needed to meet the other requirements of this project as listed below	Yes
2	The system shall be capable of easily scanning and storing images whose original documents vary greatly in size - from the size of a driver's license to at least 85 X 14 documents. In a single pass, the scanner shall be capable of capturing color images, two-sided images, and both handwritten and typed/printed images	Yes
3	Scanners shall be duplex-capable with auto-detect or blank page omission feature	Yes
4	Lossless compression is required	Yes
5	The system shall have the ability to perform image enhancements, such as de-skewing or justification, filtering brightness and contrast, de-speckling, black border removal, and cropping. The system shall allow the employee to vary the size of the image on the screen, rotate the image, and highlight selected portions of the document	Yes
6	Images shall have at least 300 DPI (dots per inch)	Yes
7	The system shall have the ability to index or file the documents into an electronic case file by logical groups for easy retrieval by the end user. Index values shall include at least client names, case numbers, social security numbers. Individual users shall be able to access the documents associated with an individual case by use of one of the following values: the name of any party associated with the case, the unique case number (assigned by the agency's mainframe computer system), or the social security number of any party to the case	Yes
8	The system shall allow a wildcard search to locate individual case files	Yes
9	The system shall support the concept that a single document will need to be routed to multiple employees or to multiple case files in multiple locations or on multiple servers	Yes
10	The system shall also support the ability of multiple users accessing a document simultaneously.	Yes



Item	Description	Vendor will provide.
		Yes/No
11	The system shall support hierarchical structures for users, which include various levels of permissions and access controls for specific documents. At a minimum, the system shall require use of a personal identification number (pin) to allow access to the system. The system shall track the pins of persons who scan or delete documents from the system and track the pin of any person who accesses a specific file. The system shall also allow for the exclusion of specific persons or classifications from specific files. It shall also allow for the exclusion of specific persons or classifications from specific documents or document types.	Yes
12	The system shall contain security measures to prevent accidental incorrect document indexing and deletion of documents, including an electronic record that shows all activities taken in relation to a specific document.	Yes
13	The system shall allow for the electronic transfer of documents to entities outside the system via encrypted electronic media or encrypted e-mail.	Yes
14	The system shall allow for the capture of print streams from the State's mainframe computer system to eliminate the need to print and scan certain forms.	Yes
15	The system shall allow for importing, storage and retrieval of read-only electronic documents from other formats including but not limited to, Word, Excel, and PowerPoint as well as multimedia formats, email and faxes.	Yes
16	The system shall have the ability to annotate or attach notes to every document or file.	Yes
17	The system shall have the ability to transfer any or all documents for a specific case from one county or server to another.	Yes
18	The system shall be capable of reading barcodes on forms which have been generated by the agency's mainframe computer system and/or its web-based form generation system (FormQuest) so that these barcodes can be scanned to automatically index the documents to the appropriate case.	Yes
19	The system shall be compatible with the use of Microsoft Office programs.	Yes
20	The system shall notify the appropriate worker(s) when a document has been received and added to their electronic case record.	Yes
21	The system shall provide the necessary security to meet IRS Safeguarding requirements for documents that contain federal tax information. (IRS Publication 1075)	Yes
22	The system shall allow each individual user to access the electronic case file from their desktop personal computer.	Yes
23	The capacity of the system shall be large enough to meet the current volume of the BCSE caseload but shall have the potential through the purchase of additional equipment and/or software licenses to expand to other Bureaus or Offices of the Department of Health and Human Resources in the future.	Yes



Item	Description	Vendor will provide.
		Yes/No
24	Upon accessing a specific case or file the individual worker shall be able to view a menu which will list the documents associated with that case, grouped by type of document (orders, correspondence, etc). The menu shall also be capable of sorting documents by date.	Yes
25	The majority of the documents to be scanned will be associated with a specific child support case However, the system shall also be capable of scanning and organizing non-case-related documents, such as management reports, employee time sheets, leave slips, and contracts	Yes
26	The scanned images shall automatically be stored, at a minimum of once a day, on redundant servers in a central location within the state network	Yes
27	The vendor shall be responsible for coordinating this work with the state staff responsible for maintenance of the statewide computer system (DHHR MIS) and with staff from the state Office of Technology	Yes
28	The vendor shall be responsible for providing appropriate training to the state staff responsible for maintenance and use of the statewide computer system including staff from the state Office of Technology, DHHR MIS and end users Training for end users shall occur in each office, and shall include the imaging of at least fifty actual case files per office, and two non-case-specific files per office, with the files to be imaged to be selected by the supervisor of that office	Yes
29	The system shall provide for local storage of documents at each county office to enable quick retrieval, but it shall also allow users across the state to see all documents assigned to that case, For example, if a paper document is delivered to Office A and it is scanned and indexed appropriately, it shall be capable of being viewed by users in any office in the system	Yes
30	The vendor shall provide the cost of a maintenance contract for the period of one year following the warranty period with the option for a least one renewal period of one year.	Yes
31	The vendor shall perform warranty and trouble-shooting activities for the system for six months after the installation of equipment, software, and training in the last office is completed, Warranty work will include, at a minimum, any software updates or patches, Said troubleshooting shall include access to telephone support and in-person support on an as-needed basis,	Yes
32	The system must be accessible by users located in the privatized Kanawha and Clay county offices, operated by Policy Studies, Inc (PSI), who are not included on the DHHR network PSI does, however, have a connection to the DHHR network via a T1 line	Yes
33	The system must run within the current DHHR Network infrastructure	Yes
34	The system must allow for the ability to run reports At a minimum, this will include all aspects of user and document access	Yes
35	The system must be able to archive and purge documents or files based on user-defined requirements Archived documents or files must be able to be retrieved,	Yes



		Vendor will provide.
Item	Description	Yes/No
36	The system must allow for searching of all parts of scanned documents	Yes
37	The system shall have Optical Character Recognition (OCR) capability to convert documents and image files into editable and searchable text. (See attached SAMPLE)	Yes
38	The system may be required to interface with the SCSE mainframe system (OSCAR) to exchange information	Yes
39	All access to the SCSE mainframe computer system (OSCAR) shall be done via DS2 stored procedures or file extracts	Yes
40	The vendor will provide technical documentation for the system to DHHR MIS and to the Office of Technology,	Yes
41	The vendor will provide an end-user guide in an electronic format accessible to all users	Yes
<b>Requirements for the Client Management System:</b>		
42	The system shall support the creation of multiple appointment types to reflect the agency's business model, such as customer appointments, customer walk-ins, staff meetings, trainings, etc. It shall allow persons of an appropriate role to perform a "busy search" in order to facilitate the scheduling of meetings and appointments	Yes
43	The system shall support unlimited numbers of configurable "waiting queues" for clients who walk into the office without a scheduled appointment	Yes
44	The system shall provide for a kiosk in the lobby area of the offices selected to participate in this project (Fairmont, Martinsburg, and Charles Town) which would allow for self-service check-in by clients that have a scheduled appointment or that do not have an appointment but wish to see a child support worker. The system would notify the appropriate worker automatically when the customer checks in	Yes
45	The system shall notify the supervisor or on-call worker at an interval selected by the agency if the customer's wait exceeds the agency's set time interval	Yes
46	The system shall allow the supervisor to easily re-assign appointments and on-call assignments	Yes
47	The system shall support a hierarchical structure for users, groups and agency that would include various permissions/authorizations by roles.	Yes
48	The system shall interface with Outlook to determine worker available hours. The system shall also allow a user to input or modify their work hours for the purpose of scheduling appointments or on-call assignments	Yes
49	The system must have the ability to generate ad-hoc reports	Yes
50	The system must produce reports to include, at a minimum, customer wait time grouped by type of appointment and/or time of day.	Yes
51	The system shall be required to interface with the SCSE mainframe system (OSCAR) to exchange appointment and worker information.	Yes



Item	Description	Vendor will provide.
		Yes/No
52	All access to the SCSE mainframe computer system (OSCAR) shall be done via DS2 stored procedures or file extracts	Yes
53	The vendor shall be responsible for providing appropriate training to the state staff responsible for maintenance and use of the statewide computer system including staff from the state Office of Technology, DHHR MIS and end users.	Yes
54	The vendor will provide technical documentation for the system to DHHR MIS and to the Office of Technology	Yes
55	The vendor will provide an end-user guide in an electronic format accessible to all users	Yes
<b>Security:</b> The system shall provide the following security features: The system must utilize security measures to protect the data and the system as set forth below:		
56	System must retain an access log of when a user logs on, logs out, or his/her session times out. This text log will contain the user's account identifier (10), date, time of logon/logout/timeout, and activity type (log in, log out, time out).	Yes
57	System must support strong password functionality that can be configured by the system administrator. These capabilities include the length of passwords, types of characters required (numbers, symbols, uppercase letters, lowercase letters), the password change interval in days, and the user password expiration notification in days	Yes
58	Must use Advanced Encryption Standard (AES) or equal information technology industry standard of data security through strong encryption, minimum of 128-bit, in all external communication.	Yes
59	System must monitor and report any unauthorized access attempts to the system administrator	Yes
60	System must support multiple user account status options to minimally include: 'Inactive or locked', 'Active', and 'Must change password upon next login' System should provide an audit log of access changes	Yes
61	System must alert users to an expiring password based on the user password expiration notification set by the administrator and prompt the user to change their password in advance of expiration.	Yes
62	System must allow users to change their own password after successfully logging into the application and enforce strong password functionality as discussed in # 2.	Yes
63	System should provide an audit log of access changes, e.g.: who granted user access, what type of access, user name, date of creation and modification	Yes
64	The vendor will provide system upgrades, patches and other changes to the application via a secure file transfer protocol SFTP site that can be accessed only by West Virginia technical staff to obtain appropriate files and documentation.	Yes



		Vendor will provide.
Item	Description	Yes/No
65	Any configurations required for the system to be installed and to run on the West Virginia test/training and production databases will be built into the source code provided by the vendor. West Virginia staff will not modify installation and/or configuration files provided by the vendor for either environment	Yes
66	The vendor will provide "back out" procedures in the event a version of the application needs to be uninstalled by West Virginia staff	Yes
67	System must store all passwords in Advanced Encryption Standard (AES) or equal information technology industry standard encrypted format	Yes
68	System must not use schema owner or privileged user (SYS, SYSTEM, etc) to connect to the database	Yes
69	System must use least privileged user to connect to database. The user utilized to connect to the database for configuring strong password parameters should not be the same user connecting to the database for other administrative processes and that should not be the same user connecting to the database for update, or the user connecting to the database for query, etc	Yes
70	System should be tested to mitigate the Top 25 Most Dangerous Programming Errors as developed by the SANS (SysAdmin, Audit, Network, Security) Institute/Mitre Corporation found at the following link to the 2009 CWE/SANS (Common Weakness Enumeration) Top 25 Most Dangerous Programming Errors: <a href="http://cwe.mitre.org/top25">http://cwe.mitre.org/top25</a> .	Yes
71	There should not be any structured query language (SQL), either static or dynamic, executed on any web page. All queries, inserts and updates should be handled by passing parameters to stored procedures. If not, vendor must explain how it will safeguard against SQL injection attacks.	Yes



## 4 Project Management

### **Project Management:**

With the bid, the vendor must provide a proposed work plan, discussing its approach to providing the products and services required to fulfill the terms of this RFQ. The work plan must demonstrate a clear grasp of the overall project and services to be provided with specific action steps that will guarantee the successful provision/completion of the project.

The vendor must use a formal and documented project management approach based on Project Management Institute (PMI) industry standards and guidelines (<http://www.pmi.org>). Microsoft Project or comparable software tools must be used to develop the work plan that includes tasks, milestones and deliverables. The project management approach and work plan must provide the State with a means of determining if the statement of work is being accomplished as scheduled with acceptable deliverables. The vendor shall designate a full-time project manager, who shall be on-site at least 100% of the time after the project begins implementation to individual offices.

The vendor must provide a list of all deliverables and the due date of those deliverables by task. The vendor shall estimate a ten (10) workday review period by the State, revision time by the vendor and an additional five (5) day re-review period by the State.

Northwoods meets or will meet upon execution all these requirements and are specifically addressed in the following section

### **4.1 Solution Overview**

Our response is based on the requirements in RFQ No CSE10015, Request for Quotation for Document Imaging System and Client Management System issued by the State of West Virginia, Department of Administration, Purchasing Division on behalf of the Department of Health and Human Resources (DHHR), Bureau for Child Support Enforcement (BCSE) on July 30, 2009. This response includes equipment, software, installation and support services to implement a document imaging system for DHHR offices statewide in 53 counties and to implement a client management system in Marion, Berkeley and Jefferson counties. The recommended approach is further detailed in this section.

After five years of focusing specifically on the human services business, Northwoods is uniquely positioned to develop and implement solutions that improve customer service and reduce processing time for agency clients. Our client scheduling, forms and document management solutions have been successfully implemented in over 70 human services agencies in five states. By focusing solely on Public Assistance, Medicaid, Child Support, Child Welfare and Work Force Development, we have gained a business expertise that allows us to smoothly transition an agency from a paper intensive environment to a truly paperless environment.





*"The Northwoods team provides more than an imaging system; they provide a complete client management process. It's important to understand the difference. Because of the efficiencies we've gained with this solution, we can serve significantly more clients without hiring more staff. An imaging system won't do that for you."*

*-Mead Wilkins, Director of Medina County Department of Job and Family Services*

Focusing on human services has allowed Northwoods to gain a vast amount of knowledge on the policy, procedures and processes necessary for an agency to operate. Additionally, we have hired former case workers and program administrators to add to the knowledge base. The practical experience from former employees and the years of experience implementing solutions within human services agencies optimally positions Northwoods for achieving the desired outcomes. This experience makes Northwoods the right choice to help BCSE achieve its goal of improving automation and efficiency in the agency.

## Document Imaging

Northwoods engineers have working knowledge of how a document imaging solution should work inside a human services agency. We understand the relationships between the departments and know which documents might be shared and which might not. We have experience setting up the proper security and user rights to ensure that common shared documents can be collected once from the client and shared between all departments. We understand how to capture documents at the point they are collected, implementing a "one touch" philosophy, rather than copying and routing documents to a central scanning area.

This proposal includes onsite discovery and design sessions facilitated by a Northwoods engineer with human services related project experience. Our engineers will work with agency staff to ensure documents are properly classified, organized and secured in the image repository. We will establish the rules that govern storage of documents and make sure they can be easily retrieved when they are needed. We will assess the common keywords that should be used — for example, SSN and client last name — so documents can be indexed properly and available for speedy retrieval.

Documents from clients come to the agency in a variety of ways:

- Carried in during interviews
- Dropped off in the lobby
- Mailed to the agency
- Faxed to the agency
- Emailed to workers

When dealing with documents that are presented in person, sending these documents to a centralized mailroom to be scanned is inefficient as it requires copying, inter-office mail routing and additional paper handling. It also opens the door to misclassification and misplacement of documents. Northwoods has adopted a "one touch" philosophy as it relates to handling documents that enter the agency through the lobby. We recommend scanning these documents immediately when received using Compass Capture and route them to the worker or



workers that need them. This eliminates copying and routing and the potential for lost or misplaced documents.

When documents are presented in person, there are several ways to capture those documents. They can be scanned by the front desk worker, the case worker can scan them while meeting with the client or in those offices where there is a self service scan kiosk the client can scan them. Scanning documents at the source allows for documents to be available immediately, eliminating the need to transport hard copies and speeds the accuracy and delivery time of mail to workers.

One of the classic challenges of capturing documents at their source is the level of knowledge the document recipient needs to operate scanning hardware and software. The Compass Capture software application provides an intuitive and easy-to-use hardware and software combination that anyone can use to scan and index documents. Document images are of a high quality and the process of assigning indexes could not be easier. The document is scanned, indexed and stored securely away in the image repository as soon as it is collected. The proposed scanners can handle source documents that vary in size and quality, are single-sided or double-sided, and can be color or black and white and can easily handle driver's licenses and other verification type documents.

Northwoods proposes to import client data from the Agency's case management system to populate document keyword sets. By capturing this information from the case management system, a case worker's ID can be automatically inserted into documents as they are scanned and indexed by case number. This process improves accuracy of the keyword data.

### ***Document Capture at the Front Desk and Mailroom***

Compass Capture is a very easy-to-use, touch-screen application that allows front desk and mailroom staff to quickly and accurately scan, classify and place documents in an electronic case file. With Compass Capture installed, front desk staff receive documents from clients as they do today, but instead of photocopying, they place the documents in the desktop scanner. They enter a unique ID such as a client's SSN or name. That unique ID is used by Compass Capture to do a look-up into the Compass database to automatically insert the client data into fields on the screen. This data is saved along with the image of the document(s) and is stored in the document repository. The process is the same for the incoming mail.

The worker then selects the document type, which triggers scanning of the document(s). When scanning is complete, the Compass Capture system sends a receipt to a printer that includes the client's demographic information, along with thumbnail images of the scanned documents. An image of the entire receipt is sent to the document repository and stored in the client's electronic file along with the images of the scanned documents. The case worker will receive these new documents in their document management inbox.

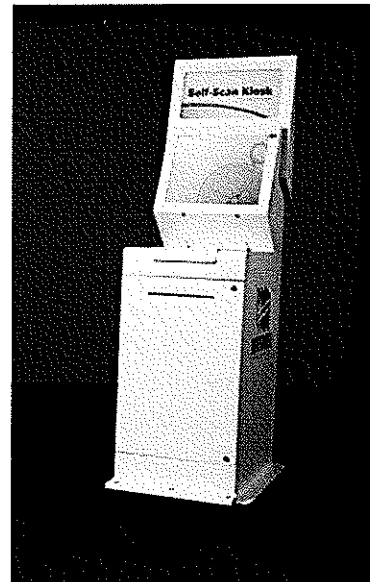


### ***Document Capture at Distributed Scanning Stations***

Similar to scanning at the front desk, Compass Capture can also be installed at distributed scanning stations for use by case workers within specific units. A distributed scanning station would be equipped with a Fujitsu FI-6130 document scanner, a printer, a touch-screen monitor, PC and furniture as illustrated. A Compass Capture distributed scanning station provides staff with the ability to quickly and accurately scan, classify and place documents in the electronic case file. Workers would share a scan station just as copiers are shared throughout the agency today.

### ***Self Service Scanning***

Compass' Self Check-in/Self Scan Kiosk allows the client to scan their own documents. This capability allows the client to avoid waiting in line at the front desk and frees the front desk to spend time helping other clients. The easy to use kiosk coaches the client through the process of identifying their case and scanning each document. Upon completion of the scanning process and validation of image quality, the documents are sent to the document repository and the documents appear in the case worker's document management inbox. The implementation of Compass Self Check-in/Self Scan Kiosks have been included for Marion, Berkeley and Jefferson counties.



### ***Fax***

Documents that are received through fax machines will need to be printed and scanned. Once they are indexed, the documents will appear in workflow. While not a part of this proposal, Northwoods would be happy to specify and implement electronic inbound and outbound faxing.

### ***E-Mail***

Documents that are received as email can easily be imported into the document repository.

### ***Document Repository***

At the center of the document imaging solution is the document repository. Compass Software integrates with many, world class, content management systems. Northwoods is recommending OnBase for BCSE. The OnBase system will manage the back-end storage of all electronic documents including documents created with Compass Capture. In addition to providing the repository for electronic documents, OnBase serves up those documents to end-users through document retrieval functionality.



## ***Scanning Existing Case Files***

This project does not include the scanning of existing case files, except as described in requirement 25 in the RFQ. For the purposes of back file scanning, Northwoods has proposed 12 Canon DR-3080 mid-volume scanners. Northwoods sees the need for mid-volume scanners to be a short term, as once the back files are scanned, the need for these scanners would be no longer necessary. Northwoods proposes that 3 mid volume scanners be placed at each of the 4 pilot sites for the completion of their back file scanning. After the pilot sites are finished, the state can place the scanners in other counties for back file conversion activities. This minimizes the cost of hardware that will be used for a limited period of time.

## **Client Management**

Northwoods has developed Compass Appointments specifically for human services agencies to better manage client flow and ultimately improve communication throughout the agency. In a recent implementation at a large metropolitan county, clients are telling their case workers and social workers that they appreciate the shorter lines and wait times. Shorter lines relieve the congestion in the lobby. Compass Appointments helps the agency to:

- Track clients check-in, appointments start and end, and record appointment type.
- Schedules and manage Hearings
- Reduce client wait times
- Manage group appointments (i e., Genetic Testing Appointments)
- Manage staff vacations.
- Maintain appointment history.
- Notify workers when a client arrives for a scheduled appointment.
- Provide reporting on appointments, average wait time and so much more.
- Provide unlimited configurable round-robin lists for balanced assignment of appointments, thus helping to level case load among workers throughout the agency.

Without Compass Appointments, clients may wait in long lines to inform front desk staff that they have arrived for an appointment with a worker. Front desk staff must go through the often laborious process of notifying the worker that their client has arrived. Whether the process involves e-mail, voice mail, or paging, the process is time consuming and further extends the client's wait. If for any reason the worker is not available, front desk staff must contact a supervisor who will attempt to locate a different worker to whom to reassign the appointment.

Marion, Berkeley and Jefferson counties will greatly benefit from the implementation of Compass Appointments software to the agency's client flow management and scheduling process. The Compass Appointments system manages the scheduling, rescheduling and assigning of appointments for intakes, hearings, genetic testing, and other appointments. Compass Appointments has the ability to track the entry of a client into the agency lobby, the notification of the worker, and the start, end and duration of an appointment. Compass Appointments shows everyone with access to the system which workers are in an appointment,



which are free to take new appointments and which are out on leave or otherwise unable to take appointments. A worker will know which clients are no-shows, which clients have rescheduled and which clients are in the building meeting with a worker at any given time.

Compass Self Check-in/Self Scan Kiosk will allow clients that have scheduled appointments to self check-in, avoiding the waiting line at the front desk. Having fewer clients at the front desk, allows the front desk workers to address other front desk tasks.

Compass Appointments provides an unlimited number of configurable queues and round-robin lists to handle walk-ins and other appointments. Queues are simply holding areas for clients who do not have an appointment but would like to see a worker or apply for benefits. Round-robin lists are used to equally distribute appointments among workers.

Compass Appointments will help with scheduling, rescheduling, tracking and balancing appointments and case work across the agency. The Appointments system tracks the number of appointments, average length of appointments, the number of no-show appointments, etc. for a single worker, for a department or for the entire agency for a day, week, month or year. The system is flexible enough to handle scheduling appointments in round-robin fashion for one department and scheduling different types of appointments for other departments.

By implementing Compass Appointments queues, the reception areas will be able to communicate via their computer. The Appointments system tracks how many clients are waiting in the lobby and how long each client has been waiting. When a worker is ready to see a client, they simply take the client from the queue and place them on their calendar. This creates a record of the client and the worker that saw them. The queue record shows who saw the client and how long the client was waiting. At the end of the day, you know how many clients each worker saw and the average wait time for each client.

The front desk staff will no longer have to navigate through screens in a separate case management system to find the time and unit of a client's appointment. If the client provides their first name, last name or social security number, a quick search in Compass Appointments tells the front desk worker which worker the client's appointment is with and the scheduled time of the appointment. This is especially helpful in agencies that serve clients seeking many different services from one central reception area.

## 4.2 Project Management Approach

Over the years we've learned a lot. And our approach to project management at Northwoods reflects that.

Interestingly, we've discovered that one of the first steps in planning for a project should be preparing our exit strategy. We've learned that the more we engage our customers during the project, the more likely they are to accelerate and maximize their return on investment. With every project that Northwoods undertakes, we are committed to a Partnered Implementation.



approach which encourages customer participation in every aspect of the project. Each of the specific project management techniques and controls we have in place embrace this approach.

The project management methodology utilized by Northwoods establishes standardized methods that ensure all project participants are using the same processes to achieve project goals and facilitates a common language among project stakeholders. Northwoods' project management methodology is extensive and includes all phases and tasks described by West Virginia BCSE in the RFQ

When reviewing our project management approach, we don't believe in the "cookie cutter". We do believe that every project is unique.

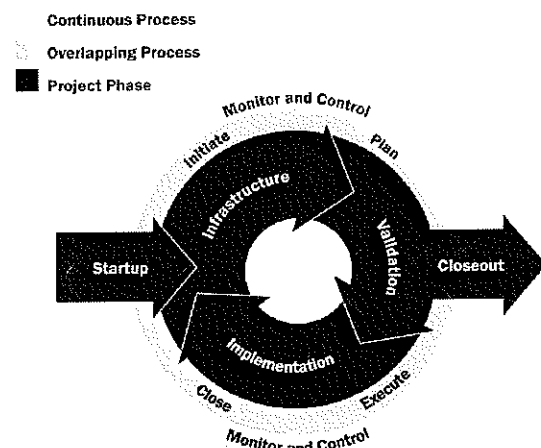
This does not mean a project cannot benefit from similar frameworks or management controls. However, projects can also be radically different as a result of several factors, including:

- Project risks and constraints
- The level of stakeholder support
- The availability of stakeholder skills to undertake work and the need for training
- The nature of the business process changes and the maturity level of the business to deal with these changes
- Changes in both the internal and external environment during the course of the project

### 4.3 Project Management Methodology

Northwoods specializes in the implementation of Document Imaging and Client Management solutions through an integrated set of products and professional services. Our project management methodology utilized to support these implementations combines best practices identified by the Project Management Institute (PMI) and practical knowledge gained through many cumulative years of experience implementing similar solutions.

The project management methodology utilized by Northwoods establishes standardized methods that ensure all project participants are using the same processes to achieve project goals and facilitates a common language among project stakeholders. Northwoods' project management methodology is extensive and includes the phases and tasks described in the BCSE RFQ





## 4.4 Work Requirements

The project is monitored closely throughout five project phases:

- Startup
- Infrastructure
- Validation
- Implementation
- Closeout

Each project phase generates a set of governing documents that serve as the description of what is to be implemented and how the implementation will occur. A set of overlapping processes (initiate, plan, execute, and close) occur during each phase of the project. The Northwoods Project Manager is responsible for monitoring and controlling the interaction of these processes and communicating milestones, progress, and potential issues to key customer stakeholders throughout the project lifecycle.

The following work requirements define the specific tasks to be completed by the Project Team as it relates to each project phase. The timeline for completion is determined by the work plan developed by the Northwoods Project Manager and approved by the BCSE Project Manager.

### 4.4.1 Startup

#### ***Objectives***

1. Plan and initiate and the project
2. Assemble project team and secure required resources

#### ***Deliverables***

- Commitment of project resources
- Approved Project Plan
- Information Technology meeting
- Approved Project Schedule
- Project kickoff
- Approved Training and Implementation Plan
- Formal status reports



### ***Related Activities***

<b>Code</b>	<b>Description</b>	<b>Responsible Party</b>
STR1	Assign a Northwoods Project Manager and advise the agency project sponsor of the assignment	Northwoods
STR2	Hold the internal Sales handoff meeting to discuss expectations, risks, and constraints related to project scope, schedule, budget, and quality.	Northwoods
STR3	Hold Information Technology (IT) meeting with West Virginia State MIS staff to identify technical requirements and discuss implementation timelines	Northwoods
STR4	Meet with Project Sponsor and other key stakeholders to outline project goals and roles and responsibilities of team members; clarify the expectations of all parties; and create a shared commitment towards project success	Northwoods
STR5	Develop and maintain a project work plan to include deliverable task activities, estimated work effort and durations for each task activity, resource assignments for each task activity, and estimated start and finish dates for all task activities.	Northwoods
STR6	Review and approve project work plan	West Virginia DHHR/BCSE
STR7	Identify and assign Northwoods Project Team members based on team member roles identified in roles and responsibilities section	Northwoods
STR8	Identify and assign West Virginia DHHR/BCSE Project Team members based on team member roles identified in roles and responsibilities	Northwoods
STR9	Provide State Project Manager with an hourly estimate of work effort required for West Virginia DHHR/BCSE Project Team members	Northwoods
STR10	Modify regular work assignments for West Virginia DHHR/BCSE Project Team members to allow sufficient time to devote to the project	West Virginia DHHR/BCSE
STR11	Hold weekly status meetings with Project Team throughout duration of project to review progress and detailed plans, and identify and communicate potential risks and issues that may affect the schedule, budget, or deliverables	Northwoods
STR12	Hold monthly status meetings with Executive Review Team throughout duration of project to establish priorities, assist in resolving issues and make executive decisions necessary to meet project objectives	Northwoods
STR13	Review Statement of Work and functional specifications with State Project Manager	Northwoods





Code	Description	Responsible Party
STR14	Develop and maintain a training plan to include the type of training, target audience, number of users being trained, number of training sessions and duration, anticipated training dates, and documentation/materials provided	Northwoods
STR15	Review and approve training plan	West Virginia DHHR/BCSE
STR16	Hold the agency kickoff meeting, including product demonstrations, at the agency site to formally kickoff project	Northwoods
STR17	Hold phase gate review with State Project Manager to validate related work requirements and officially closeout the phase	West Virginia DHHR/BCSE

#### 4.4.2 Infrastructure

##### **Objectives**

1. Install and configure server and desktop hardware
2. Complete preliminary software configuration
3. Deploy client-side software

##### **Deliverables**

- Functional review
- Architecture analysis and site surveys
- Installed and configured enterprise hardware systems
- Business requirements
- Functional specifications
- Finalized taxonomy
- Preliminary software configuration
- Updated Project Schedule
- Formal status reports



**Related Activities**

Code	Description	Responsible Party
INF1	Perform architecture analysis and site survey at each site to identify any additional network and/or electrical power modifications necessary to accept project hardware and software	Northwoods
INF2	Submit necessary purchase orders to procure all system hardware and software	Northwoods
INF3	Provide secure storage area for up to one month to stage hardware at each site prior to installation	West Virginia DHHR/BCSE
INF4	Install any additional electrical outlets in central enterprise server room(s) to accept UPS device connections	West Virginia State MIS
INF5	Inventory all system hardware upon receipt and initiate any needed exchanges for hardware components that were shipped incorrectly or follow-up on missing/damaged hardware components	Northwoods
INF6	Establish a network account for Northwoods engineers to configure and/or review software installed on client and test server computers	West Virginia State MIS
INF7	For the duration of the project, provide VPN or Hamachi (Logmein com) remote access to Northwoods engineers to the system server and image file shares	West Virginia State MIS
INF8	Install and configure central enterprise servers and related equipment at the state office, including 3 servers, server rack, UPS, KVM switch, SAN, 2 fiber channel switches, and a tape drive autoloader	Northwoods
INF9	Install all prerequisite system software on central enterprise servers, including all updates and patches for Windows Server 2003 operating system, SQL Server, and anti-virus	Northwoods
INF10	Perform initial registration and/or licensing for software installed on central enterprise servers	Northwoods
INF11	Recommend a backup and disaster recovery procedure for central enterprise servers	Northwoods
INF12	Configure back-up jobs and perform daily backups of all related systems, database, and data files and maintaining current backed-up copies of other pertinent systems and data files located on central enterprise servers	West Virginia State MIS
INF13	Provide Northwoods system engineers access to client demographic information for the purpose of autofill	West Virginia State MIS
INF14	Configure application software to import client demographic information for autofill purposes	Northwoods
INF15	Facilitate taxonomy meeting(s) and provide sample document mappings (taxonomy) for West Virginia DHHR/BCSE to determine filing structure used to name and organize electronic documents (taxonomy)	Northwoods



Code	Description	Responsible Party
INF16	Participate in taxonomy meeting(s )and provide finalized copy of taxonomy to Northwoods Project Manager	West Virginia DHHR/BCSE
INF17	Facilitate discovery interviews with West Virginia DHHR/BCSE subject matter experts to determine business requirements	Northwoods
INF18	Participate in business requirements interviews	West Virginia DHHR/BCSE
INF19	Complete preliminary configuration of application software to functional requirements identified in RFQ CSE10015	Northwoods
INF20	Hold phase gate review with State Project Manager to validate related work requirements and officially closeout the phase	Northwoods

#### 4.4.3 Validation

##### **Objective**

1. Verify that all system requirements are behaving according to the Functional Specification.

##### **Deliverables**

- Configured test environment
- Approved Test Plan
- Test Plan results
- Delivered Pilot Team training and rollout support
- Prototype review
- Updated Project Schedule
- Authorization to proceed
- Formal status reports
- Document imaging pilot phase gate review



**Related Activities**

Code	Description	Responsible Party
VLD1	According to approved Implementation Plan, install any additional electrical outlets and network drops necessary for local servers at each pilot county office (4 sites) to accept UPS device connections	West Virginia DHHR/BCSE
VLD2	According to approved Implementation Plan, install any additional electrical outlets and network drops required for scanning stations at each pilot county office (4 sites) as needed	West Virginia DHHR/BCSE
VLD3	According to approved Implementation Plan, at each pilot county office (4 sites), install and configure a local server, network storage device and related equipment to include NAS, UPS, monitor, keyboard, and mouse.	Northwoods
VLD4	Perform initial registration and/or licensing for software installed on all local servers at pilot county offices (4 sites)	Northwoods
VLD5	Recommend a backup and disaster recovery procedure for local servers at pilot county offices (4 sites)	Northwoods
VLD6	Configure back-up jobs and perform daily backups of all related systems, database, and data files and maintaining current backed-up copies of other pertinent systems and data files located on local servers at pilot county offices (4 sites)	West Virginia State MIS
VLD7	Install any additional electrical outlets and network drops necessary for at pilot county offices (4 sites)	West Virginia DHHR/BCSE
VLD8	Deploy and configure all system hardware at Phase 2 pilot county offices (4 sites) to include local server, scan station, kiosk, desktop scanner and related workstation equipment, label printer and numeric keypad	Northwoods
VLD9	Establish a local test environment at Marion County	Northwoods
VLD10	Facilitate user acceptance testing of client management solution and document test results	Northwoods
VLD11	As a result of user acceptance testing, update client management software configuration	Northwoods
VLD12	Hold prototype review with Executive Review Team and other key staff to validate the client management prototype solution meets or exceeds all business and functional requirements	Northwoods
VLD13	Approve client management solution for implementation in Marion, Berkeley, and Jefferson Counties	West Virginia DHHR/BCSE
VLD14	According to approved training schedule, provide the appropriate training facilities for onsite pilot team training – available for set up one day in advance of any scheduled training – at 4 pilot sites (Marion, Monongalia, Braxton and Logan)	West Virginia DHHR/BCSE
VLD15	According to approved training schedule, deliver onsite document	Northwoods



Code	Description	Responsible Party
VLD16	imaging training for up to 57 end users at 4 pilot sites (Marion, Monongalia, Braxton and Logan) Provide onsite rollout support for up to 57 end users at pilot sites (Marion, Monongalia, Braxton and Logan)	Northwoods
VLD17	During pilot process, test system hardware and software configuration to validate business requirements are achieved	West Virginia DHHR/BCSE
VLD18	As a result of pilot process, update hardware and software systems configuration	Northwoods
VLD19	Hold prototype review with Executive Review Team and other key staff to validate the document management prototype solution meets or exceeds all business and functional requirements	Northwoods
VLD20	Approve the document imaging prototype solution for statewide implementation	West Virginia DHHR/BCSE
VLD21	Hold phase gate review with State Project Manager to validate related work requirements and officially closeout the phase	Northwoods

#### 4.4.4 Implementation

##### **Objective**

1. Train and support end users on system functions and new or revised business processes

##### **Deliverables**

- Workstation hardware and software deployment
- Delivered training to all affected end users
- Rollout support for all affected end users
- Updated Project Schedule
- Updated Training Plan
- Formal status reports
- Client Management phase gate review
- Document imaging statewide phase gate review



***Related Activities***

<b>Code</b>	<b>Description</b>	<b>Responsible Party</b>
IMP1	Deliver technical administration training for up to 5 West Virginia State MIS staff members	Northwoods
IMP2	According to approved Implementation Plan, install any additional electrical outlets and network drops necessary for local servers at each non-pilot county office (49 sites) to accept UPS device connections	West Virginia DHHR/BCSE
IMP3	According to approved Implementation Plan, install any additional electrical outlets and network drops required for scanning stations at each non-pilot county office (49 sites) as needed	West Virginia DHHR/BCSE
IMP4	According to approved Implementation Plan, at each non-pilot county office (49 sites), install and configure a local server, network storage device and related equipment to include NAS, UPS, monitor, keyboard, and mouse.	Northwoods
IMP5	Perform initial registration and/or licensing for software installed on all local servers	Northwoods
IMP6	Recommend a backup and disaster recovery procedure for local servers	Northwoods
IMP7	Configure back-up jobs and perform daily backups of all related systems, database, and data files and maintaining current backed-up copies of other pertinent systems and data files located on local servers	West Virginia State MIS
IMP8	According to approved Implementation Plan and functionality requirements, deploy and configure all system hardware in county offices to include local servers, scan stations, kiosks, desktop scanners and related workstation equipment, label printers and numeric keypads	Northwoods
IMP9	According to approved Implementation Plan, deploy client-side software according to functionality requirements	Northwoods
IMP10	Configure local servers to define keywords, auto-fill keyword sets, and other configurable options; create users, user groups, and establish the appropriate security levels for system users	Northwoods
IMP11	Perform initial installation of up to 12 mid-volume scanners in 4 pilot sites (Marion, Monongalia, Braxton and Logan) for the purpose of back file scanning	Northwoods
IMP12	Provide consultation and/or documentation for state MIS technicians to install mid-volume scanners in subsequent (non-pilot) sites	Northwoods
IMP13	After completing back file scanning at pilot sites, install mid-volume scanners in subsequent centers based on rotation schedule	West Virginia State MIS
IMP14	According to approved training plan, provide the appropriate training facilities for onsite agency training (available for set up one day in advance of any scheduled training )	West Virginia DHHR/BCSE



Code	Description	Responsible Party
IMP15	According to approved training schedule, deliver onsite client management training for up to 47 end users at Marion, Berkeley, and Jefferson Counties	Northwoods
IMP16	According to approved training plan, deliver onsite client management training for supervisory staff at Marion, Berkeley, and Jefferson Counties	Northwoods
IMP17	According to approved training schedule, deliver client management system administrator training for up to 2 agency staff Marion, Berkeley, and Jefferson Counties	Northwoods
IMP18	According to approved training schedule, deliver onsite document imaging training for up to 355 end users at each non-pilot county office (49 sites)	Northwoods
IMP19	According to approved training schedule, deliver onsite document imaging training for supervisory staff at each non-pilot county office (49 sites)	Northwoods
IMP20	According to approved training schedule, deliver onsite document imaging training for up to 2 system administrators at each non-pilot county office (49 sites)	Northwoods
IMP21	Hold phase gate review with State Project Manager to validate related work requirements and officially closeout the phase	Northwoods



#### 4.4.5 Phase 5 – Closeout

##### **Objective**

- 1 Verify completion of objectives and quality of all project deliverables and formally close project.

##### **Deliverables**

- Compiled post-project surveys
- Updated Issues Log
- Project record archive
- Maintenance and Support Plan
- Release of project resources—staff, facilities, and automated systems
- Updated Project Schedule
- Acceptance of project deliverables indicated by sponsor sign-off
- Project Closure Report
- Project Implementation and Evaluation Review (PIER)

##### **Related Activities**

Code	Description	Responsible Party
CLS1	Review outstanding issues and workarounds with County Project Manager prior to project acceptance	Northwoods
CLS2	Distribute, collect and compile post-project surveys	Northwoods
CLS3	Hold phase gate review with State Project Manager to validate related work requirements and officially closeout the phase	Northwoods
CLS4	Prepare Project Closure Report	Northwoods
CLS5	Review Project Closure Report with Executive Review Committee and key staff	Northwoods
CLS6	Review project deliverables and signoff on Closure Report to officially closeout project	West Virginia DHHR/BCSE Sponsor
CLS7	Review Maintenance and Support Plan with Project Sponsor	Northwoods
CLS8	Document project results and lessons learned in Post Implementation Evaluation Report	Northwoods
CLS9	Perform administrative closure: final invoicing; collection and archival of project records; release of project resources (staff, facilities, automated systems, etc)	Northwoods





#### 4.4.6 Activities Not Included in Project Scope

The following activities are not included in the scope of this project. It is the responsibility of West Virginia Department of Health and Human Resources and Bureau of Child Support Enforcement to plan for and purchase these items if applicable.

##### Description

Re-training of employees and training of new employees who did not attend initial training sessions

Any programming modifications to the application software; suggestions for changes/enhancements may be considered for future software releases but implementation will not be contingent upon these changes

Printed training and/or reference manuals other than quick reference guides

Disposal of packaging material

Consumable supplies for printers and scanners

Any activities not explicitly included as related activities above

#### 4.4.7 Location and Hours of Work

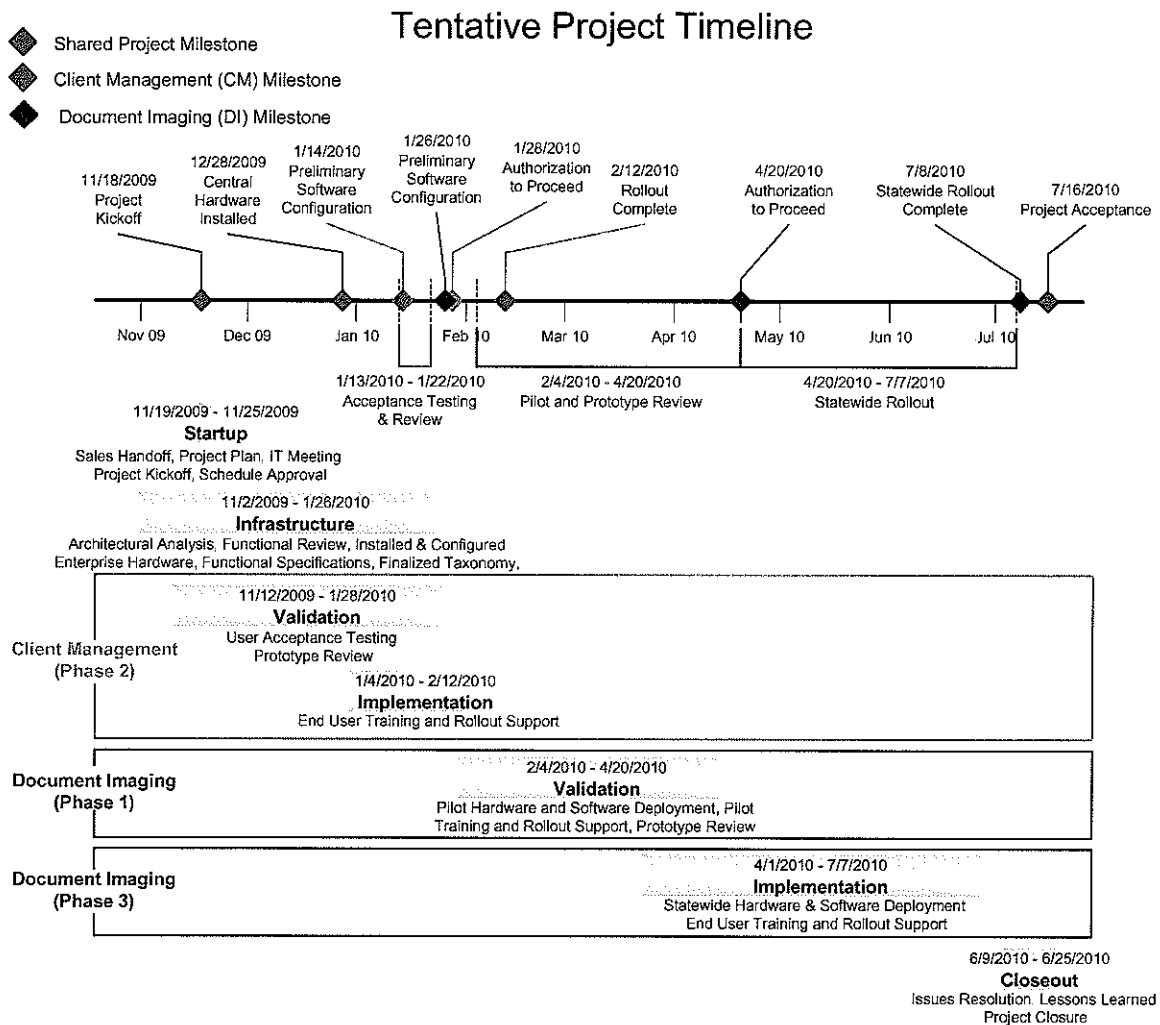
The work activities by Northwoods staff will be performed onsite at West Virginia Department of Health and Human Resources and remotely. As a result, Northwoods Project Team members will require facility access and the use of an office throughout the duration of the project. The office space must be able to accommodate up to three Project Team members, have the ability to be secured, and include at least one active network jack (Ethernet connection). In addition a storage area is needed to stage hardware at each site (up to one month) prior to installation. A local phone system is also recommended. Facility access will normally be restricted to normal working hours; however, on occasion, open/escorted facility access may be required after hours when work activities cannot be accomplished during normal working hours.

A detailed work plan produced by the Northwoods Project Manager and approved by the State Project Manager will identify anticipated start and finish dates for all related project activities.



## 4.5 Project Timeline

The following timeline provides an anticipated time frame for key milestones and high-level project activities. Northwoods is incorporating BCSE phases in our approach. The project approach will be to engage in building the core infrastructure and then will implement Appointments in the pilot units (Phase 2), implement the Document Imaging Pilot (Phase 1) and implement the Production environment state wide (Phase 3). The actual Project Schedule is developed by the Northwoods Project Manager during the Startup Phase. The Agency Project Manager from BCSE reviews the schedule, makes recommendations for changes (if needed), and approves the final Project Schedule.



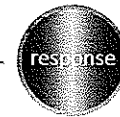


## 4.6 Target Dates for Project Deliverables

Based on the Project Work Plan, the following chart identifies target dates for each deliverable. It is important to note that these dates are representative of the Northwoods Project Methodology Phase structure. Northwoods has incorporated the BCSE phases into our project framework and included all tasks and deliverables in our tentative project schedule. The dates below are a high level view of what needs to be delivered in order for the project to remain on schedule and complete in the required timeframe

CM = Client Management    DI = Document Imaging

Description	RFQ Phase	Target Date
<b>Startup</b>		
Commitment of project resources	All	October 29, 2009
Approved Project Plan	All	November 6, 2009
Information Technology meeting	All	November 4, 2009
Approved Project Schedule	All	November 20, 2009
Project kickoff	All	November 18, 2009
Approved Training and Implementation Plan	All	November 25, 2009
Formal status reports	All	Ongoing
<b>Infrastructure</b>		
Functional review	All	November 25, 2009
Architecture analysis	All	December 7, 2009
Installed and configured central enterprise hardware systems	All	December 28, 2009
Business requirements	Phase 2	November 30, 2009 (CM)
	Phase 1	January 4, 2010 (DI)
Functional specifications	Phase 2	December 1, 2009 (CM)
	Phase 1	January 5, 2010 (DI)
Finalized taxonomy	Phase 2	December 10, 2009
Preliminary software configuration (client management)	Phase 2	January 14, 2010 (CM )
	Phase 1	January 26, 2010 (DI)
Updated Project Schedule	All	Ongoing
Formal status reports	All	Ongoing



Description	RFO Phase	Target Date
<b>Validation</b>		
Configured local test environment	Phases 1 & 2	January 13, 2010
Approved Test Plan	Phases 1 & 2	November 20, 2009
Test Plan results	Phase 2 Phase 1	January 22, 2010 (CM) April 16, 2010 (DI)
Delivered training to Pilot Team	Phase 1	April 1, 2010 (DI)
Rollout support for Pilot Team	Phase 1	April 7, 2010 (DI)
Prototype review	Phase 2 Phase 1	January 27, 2010 (CM) April 9, 2010 (DI)
Updated Project Schedule	All	Ongoing
Authorization to proceed	Phase 2 Phase 1	January 28, 2010 (CM) April 16, 2010 (DI)
Formal status reports	All	Ongoing
Pilot document imaging phase gate review	Phase 1	April 20, 2010
<b>Implementation</b>		
Workstation hardware and software deployment	Phase 2 & Phase 3	Varies depending on implementation schedule
Delivered training to all affected end users	All	Varies depending on implementation schedule
Onsite rollout support for all affected end users	All	Varies depending on implementation schedule
Updated Project Schedule	All	Ongoing
Updated Training Plan	All	Ongoing
Formal status reports	All	Ongoing
Client Management phase gate review	Phase 2	February 12, 2010
Statewide document imaging phase gate review	Phase 3	July 8, 2010
<b>Closeout</b>		
Compiled post-project surveys	All	July 16, 2010
Updated Issues Log	All	July 9, 2010
Project record archive	All	July 22, 2010
Maintenance and Support Plan	All	July 16, 2010
Release of project resources—staff, facilities, and automated systems	All	July 26, 2010



Description	RFQ Phase	Target Date
Updated Project Schedule	All	July 26, 2010
Project Closure Report	All	July 16, 2010
Acceptance of project deliverables indicated by sponsor sign-off	All	July 16, 2010
Project Implementation and Evaluation Review (PIER)	All	July 21, 2010

## 4.7 Project Controls

For every project, Northwoods implements a proven project controls system that integrates planning, scheduling, estimating, administration, and status reporting functions to simplify project monitoring, reporting, and decision-making. Since too many complex controls can limit efficiency and effectiveness, Northwoods infuses project controls with a healthy dose of old-fashioned common sense so the pursuit of control does not become more burden than value. These controls begin early in the project with planning and end late in the project with post-implementation review, having thorough involvement in each step of the process.

Our controls are aimed to bring information closer to decision makers in a timely and effective manner using both manual and automated tools, such as Microsoft Project Server, standardized reports and a set of governing documents

### 4.7.1 Governing Documents

The following is a list of the governing documents that the Project Team will develop and maintain.

#### ***Business Requirements***

The Business Requirements document defines BCSE's needs pertaining to Document Imaging and Client Management technologies and associated business process changes. Specific functional requirements are documented within the Functional Specification

#### ***Project Plan***

The Project Plan serves as an agreement between the Project Team, the Project Sponsor and key stakeholders. It represents a common understanding of the approach the Project Team will take in organizing and managing the Document Imaging and Client Management solution at BCSE, including key initial decisions made regarding goals, work scope, team requirements, team processes, and risk. This plan serves as the foundation for managing the project. It includes a description of the project structure and is the repository for a series of other plans.



- **Staffing Management Plan:** The Staffing Management Plan defines the project organization, resource planning (people) and process for managing project staffing. It describes when and how human resources will be brought onto and taken off of the project. The Staffing Management Plan provides for orderly and efficient management of human resources within the context of the overall Project Plan.
- **Schedule Management Plan:** The Schedule Management Plan describes who establishes a baseline schedule and the process for controlling schedule change and activity tracking.
- **Change Control Plan:** The Change Control Plan describes the processes, tools and responsibilities for controlling the necessary changes to project scope and schedule. The plan discusses change identification, submission, authorization and implementation, as well as the tools used to track, document and communicate project changes.
- **Risk and Issues Management Plan:** The Risk and Issues Management Plan describes how risks are identified, tracked, assessed and responded to. The plan identifies the tools used to capture identified risks, risk categories, assigned owners, calculated probabilities, identified thresholds or triggers for instigating mitigating action and contingency plans.
- **Quality Management Plan:** The Quality Management Plan describes the processes used to maintain project quality assurance and quality control. It contains the criteria used to determine acceptable products and the processes used to control quality during the development and deployment of project deliverables.
- **Communications Management Plan:** The Communications Management Plan describes communication channels, targeted groups, and how information is distributed.

### ***Test Plan***

The Test Plan documents the major goals for verifying functional behavior of the Document Imaging and Client Management technologies prior to implementation.

### ***Training and Implementation Plan***

The Training and Implementation Plan contains the major goals and the management approach that will bring the Document Imaging and Client Management technologies into production for all affected end users, including:

- Development of training schedule (produced by the Northwoods Project Manager and approved by the Agency Project Manager).
- Establishment of training requirements such as staffing, facility, equipment, and documentation needs.
- Delivery of new technology training and new /revised business processes to all affected groups.
- Steps taken to deploy software to end user desktop environments.



## **Functional Specification**

The Functional Specification captures configuration requirements and the solution design needed for the Document Imaging and Client Management implementation. The Project Team researches the needs of user groups within the agency and creates documented conditions used during the Validation Phase of the project.

### **4.8 High Level Project Activities**

The following activities describe high-level tasks for the proposed Document Imaging and Client Management Solution. Detail for each activity is provided in the Work Requirements section.

#### **4.8.1 Integrate or Change Business Processes**

Several business process changes may be required in order to take advantage of the Document Imaging and Client Management technologies. The Project Team interviews key representatives throughout BCSE to determine which business processes will be impacted and how the required changes can be best managed.

- **Requirements Gathering:** Subject matter experts from each program area participate in interviews to determine business requirements and specific configuration needs within BCSE. The results of these interviews are documented as functional requirements and detailed as system requirements in the Functional Specification.
- **Configuration Requirements:** Configuration design and settings result from the Functional Specification which serves as the set of baseline processes that will be modified or added to as the project moves forward.
- **Current Processes:** The Project Team determines if current business processes can/should be integrated into Document Imaging and Client Management technologies. Current processes are leveraged to the extent possible in a manner that promotes consistency, efficiency and best practices.
- **New Processes:** The Project Team determines if new business processes are needed to optimize the Document Imaging and Client Management Solution. If new processes are needed, they are incorporated into the implementation strategy.

#### **4.8.2 Install and Configure Technology**

The Project Team is responsible for deploying all software and hardware necessary to create an agency-wide production environment that makes efficient use of Document Imaging and Client Management technologies.



- **Hardware:** The Project Team describes all computer and networking hardware changes needed to effectively use the Document Imaging and Client Management technologies. The Project Team conducts and/or attends the discovery and architecture change meetings needed to identify these changes, and then documents all results. The Project Team also generates the necessary documentation to procure additional hardware. In addition, the team ensures that the hardware is installed and operational.
- **Prerequisite System Software:** The Project Team licenses, installs and configures all software systems needed to ensure that Document Imaging and Client Management technologies can be operated effectively. This includes ensuring that all prerequisite systems such as operating systems, service packs and so on, are installed and configured.
- **Document Imaging and Client Management Software:** The Project Team ensures that all core software and prerequisite software required to implement the Document Imaging and Client Management technologies is appropriately installed and configured per the requirements stated within the Functional Specification.

#### 4.8.3 Train System Users

The Project Team is responsible for ensuring that technology training on Document Imaging and Client Management technologies is delivered in a timely manner, and that it is closely integrated with the business process training delivered to West Virginia BCSE staff.

- **Business Processes Training:** The Project Team creates training material to instruct all affected agency staff on the use of revised and new business processes relating to Document Imaging and Client Management technologies. The team also ensures that training is delivered in a timely manner and that it is integrated with the technology training.
- **Technology Training:** The Project Team ensures that training material and facilities are available to instruct all affected end users on the use of new technologies. Training subjects include:
  1. Using basic end user features.
  2. Using the technologies to perform supervisory functions.
  3. Using system administration features to install, configure, and maintain application software.

#### 4.8.4 Support End Users

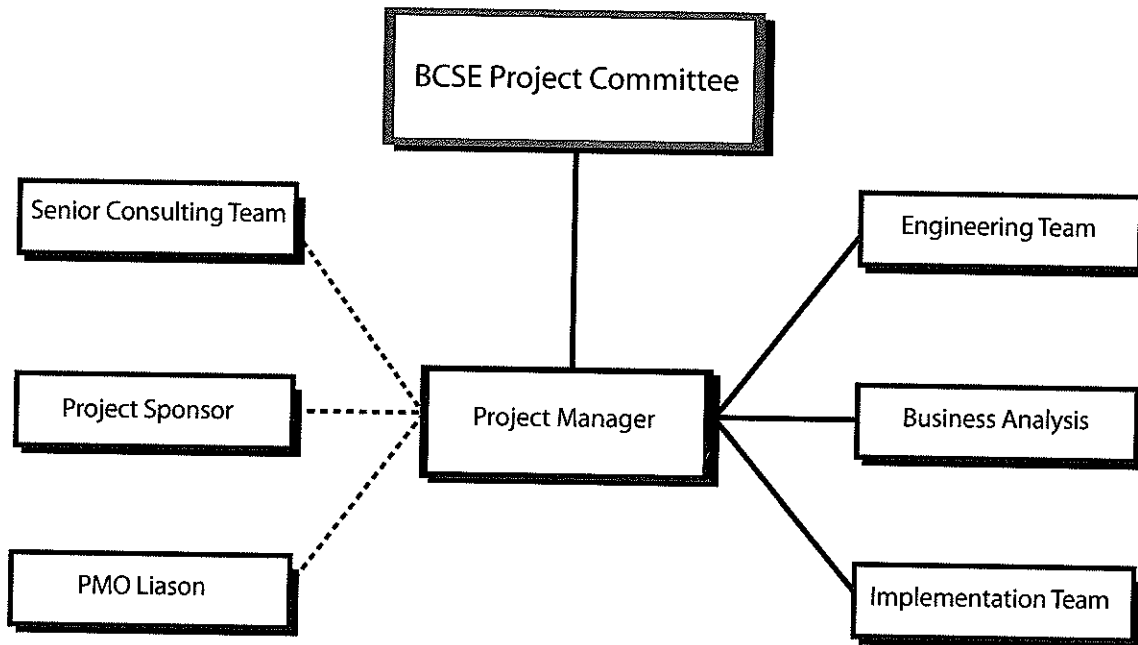
In-unit support of targeted end users by the Project Team facilitates adoption of new/revised business processes and greater acceptance of technologies in a production environment.

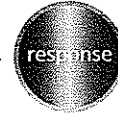




## 4.9 Project Roles and Responsibilities

Projects are most successful when all stakeholders are actively engaged. By taking full advantage of a collaborative relationship between BCSE and Northwoods staff, a Partnered Implementation approach promotes knowledge transfer and buy-in throughout the project as all technology (hardware and software) and associated business-process changes are deployed in a series of cycles.





Project Role	Responsibility
<b>Northwoods Project Team</b>	
Project Manager	Responsible for successful implementation of all project deliverables within constraints of scope, schedule, budget and quality
Executive Sponsor	Provides executive sponsorship for the project (for Northwoods)
Senior Consulting Team <ul style="list-style-type: none"> <li>• Implementation &amp; Functional requirements</li> <li>• Architecture and Design</li> <li>• Engineering &amp; Workflow</li> <li>• Development</li> </ul>	Serves as lead consultant for area of expertise; provides coaching, mentoring, and problem solving assistance to respective team members to ensure quality of products and/or services
Project Management Office (PMO) Liaison	Provides reporting, training, administration, and monitoring services to Northwoods Project Manager; conducts bi-weekly project plan reviews with Northwoods Project Manager and Executive Sponsor
Business Analysis Team <ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Senior Business Analyst</li> <li>• Business Analyst</li> <li>• Documentation Specialist</li> </ul>	Reviews business processes to determine configuration requirements and delivers Functional Specifications to Systems Engineer
Engineering Team <ul style="list-style-type: none"> <li>• Senior Engineer</li> <li>• OnBase/Compass Engineer</li> <li>• Workflow Engineer</li> <li>• Hardware Engineer</li> </ul>	Configures application software to functional specifications; deploys all hardware (server, desktop and scan stations) and client-side software; promotes test system to production environment delivers; System Administration training
Implementation Team <ul style="list-style-type: none"> <li>• Project Manager</li> <li>• Regional Coordinator</li> <li>• Project Support Specialist</li> <li>• Trainer</li> </ul>	Trains and supports all affected end users



Project Role	Responsibility
<b>West Virginia BCSE Project Team</b>	
Project Sponsor	Provides executive sponsorship for the project (for BCSE); authorizes release of payment according to contract terms
Executive Review Committee	Responsible for the best interests of the project, end users, and other stakeholders; sets priorities, assists in resolving issues and makes executive decisions necessary to meet project objectives
Agency Project Manager	Coordinates all BCSE project activities and makes policy-related decisions; reviews weekly status report with Northwoods Project Manager; facilitates the design and development of project phases; confers with Project Team and Project Committee regarding project progress
Information Technology Administrator	Liaison with Northwoods Architecture Analysis Team and Engineering Team regarding technical requirements; ensures remote server access to Northwoods Engineering Team; ensures completion of daily backup operations
Agency System Administrator	Attends system administration training; observes Northwoods' Systems Engineer and provides ongoing configuration of application software
Agency Trainer(s)	Observes Northwoods' Trainer and provides post-project business process and application training
Taxonomy Team	Determines filing structure used to name and organize electronic documents
Pilot Team	Validates agency functional requirements are met during Validation Phase
Subject Matter Experts (SMEs)	Participate in interviews to determine configuration requirements; recommend policy decisions to Agency Project Manager

#### 4.10 Tracking and Monitoring Progress

A Schedule Management Plan describes the processes, methods, and tools used to manage the Document Imaging and Client Management project schedule. By identifying who establishes the baseline schedule and how related activities are tracked, accounted for and maintained throughout the project lifecycle, the Schedule Management Plan ensures the right people are working on the right activities at the right time.

- **Schedule Development and Control:** The Northwoods Project Manager creates a Project Schedule using Microsoft Project. The Project Schedule defines all activities



associated with developing project deliverables and executing project work and contains the following information:

- a. Deliverable task activities
- b. Estimated work effort and durations for each task activity
- c. Resource assignments for each task activity
- d. Estimated start and finish dates for all task activities
- e. Intermediate and terminating milestones
- f. Summary tasks that roll up task activities and milestones

During the Startup Phase, the Agency Project Manager reviews the project, makes recommendations for changes (if needed), and approves the final Project Schedule. The approved Project Schedule is then published in Project Server.

- **Activity Tracking:** The Northwoods Project Team monitors and updates the Project Schedule in Project Web Access as task activities are completed. The schedule is routinely evaluated by the Northwoods Project Manager for comparison of baseline data against actual performance. As a result, the Northwoods Project Manager identifies schedule variance and potential problems, makes adjustments to the schedule and/or reassigns resources, and reports progress to appropriate stakeholders and team members.

#### 4.11 Status Reporting

The Northwoods Project Manager delivers (electronically or printed) weekly status reports to key stakeholders in order to review progress and detailed plans (tasks, assignments, and action items), and to identify and communicate potential risks and issues that may affect the schedule, budget, or deliverables. In addition, the Northwoods Executive Sponsor meets monthly with the Agency Executive Review Committee to review status reports and seek approval for any change requests

#### 4.12 Work Plan

The Work Plan on the following pages depicts specific tasks to be completed by the Project Team as it relates to each project phase during contract performance.



ID	Task Name	Duration	Start	Finish
0	Document Imaging System and Client Management System Work Plan	180 days	Mon 10/19/09	Mon 7/26/10
1	Project Approved	0 days	Mon 10/19/09	Mon 10/19/09
2	Monitor and control project	184 days	Mon 10/19/09	Fri 7/18/10
3	Startup	27 days	Mon 10/19/09	Wed 11/25/09
4	Definition	2 days	Mon 10/19/09	Tue 10/20/09
5	Review sales documentation	1 day	Mon 10/19/09	Mon 10/19/09
6	Hold sales handoff meeting	1 day	Tue 10/20/09	Tue 10/20/09
7	Project Schedule/Work Plan	24 days	Wed 10/21/09	Wed 11/25/09
8	Prepare/review preliminary project schedule	3 days	Wed 10/21/09	Fri 10/23/09
9	Assemble project team	3 days	Mon 10/26/09	Wed 10/28/09
10	Update project schedule with resources	1 day	Thu 10/29/09	Thu 10/29/09
11	Review and signoff Project Schedule	10 days	Fri 11/6/09	Fri 11/20/09
12	Project Schedule Approved	0 days	Fri 11/20/09	Fri 11/20/09
13	Publish approved schedule to Project Server	1 day	Mon 11/23/09	Mon 11/23/09
14	Update staffing plan	1 day	Tue 11/24/09	Tue 11/24/09
15	Project Plan	13 days	Wed 10/21/09	Fri 11/6/09
16	Develop project plan	5 days	Wed 10/21/09	Tue 10/27/09
17	Review project plan with agency project manager	1 day	Fri 11/6/09	Fri 11/6/09
18	Training & Implementation Plan	3 days	Mon 11/23/09	Wed 11/25/09
19	Prepare preliminary training & implementation plan	2 days	Mon 11/23/09	Tue 11/24/09
20	Review training & implementation plan with agency project manager	1 day	Wed 11/25/09	Wed 11/25/09
21	Internal Kickoff	5 days	Thu 10/29/09	Thu 10/29/09
22	Prepare for internal kickoff meeting	1 day	Thu 10/29/09	Thu 10/29/09
23	Attend internal kickoff meeting	1 day	Fri 11/6/09	Fri 11/6/09
24	MIS Planning Meeting	18 days	Fri 10/23/09	Wed 11/18/09
25	Send email to state MIS Director to initiate project	3 days	Mon 10/26/09	Wed 11/4/09
26	Prepare for state MIS technology planning meeting	1 day	Mon 10/26/09	Mon 10/26/09
27	Hold technology planning meeting with MIS Director and key staff	1 day	Tue 11/3/09	Tue 11/3/09
28	BCSE Planning Meeting	10 days	Wed 11/4/09	Wed 11/4/09
29	Send email to agency Project Sponsor to initiate project	1 day	Fri 10/23/09	Thu 11/5/09
30	Prepare for agency planning meeting	1 day	Fri 10/23/09	Fri 10/23/09
31	Hold planning meeting with agency Project Sponsor and key staff	1 day	Mon 11/2/09	Mon 11/2/09
32	Project Kickoff	3 days	Thu 11/5/09	Thu 11/5/09
33	Prepare for agency kickoff	2 days	Mon 11/16/09	Wed 11/18/09
34	Hold agency kickoff meeting	1 day	Mon 11/16/09	Tue 11/17/09
35	Project Kickoff Complete	0 days	Wed 11/18/09	Wed 11/18/09
36	Schedule discovery and taxonomy meetings	1 day	Wed 11/18/09	Wed 11/18/09
37	Startup Complete	1 day	Thu 11/18/09	Thu 11/18/09
38	Infrastructure	0 days	Thu 11/18/09	Thu 11/18/09
39	Perform site surveys and DHSS network architectural analysis (all agencies)	54 days	Wed 11/25/09	Wed 11/25/09
40	Functional Review	20 days	Mon 11/2/09	Tue 11/24/09
41	Prepare for functional review	5 days	Thu 11/5/09	Mon 12/7/09
42		1 day	Thu 11/19/09	Wed 11/25/09
43		1 day	Thu 11/19/09	Thu 11/19/09

Task: Document Imaging System an  
 Date: Fri 8/28/09

Summary  
 Rolled Up Task  
 Rolled Up Critical Task  
 Rolled Up Milestone

Task  
 Critical Task  
 Progress  
 Milestone

Group By Summary  
 Deadline

Project Summary

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ID	Task Name	Duration	Start	Finish
44	Hold functional review with agency project manager	1 day	Wed 11/25/09	Wed 11/25/09
45	Central Enterprise Environment	30 days	Mon 12/28/09	Mon 11/10/09
46	Order enterprise hardware (test & production)	1 day	Tue 11/10/09	Tue 11/10/09
47	Inventory enterprise hardware	5 days	Mon 11/30/09	Fri 12/4/09
48	Install enterprise servers, communication equipment, tape units and printers	5 days	Mon 12/7/09	Fri 12/11/09
49	Install and license enterprise server system software	5 days	Tue 12/8/09	Mon 12/14/09
50	Configure enterprise test environment	8 days	Tue 12/15/09	Mon 12/28/09
51	Enterprise Environment Complete	0 days	Mon 12/28/09	Mon 12/28/09
52	Preliminary Software Configuration	54 days	Tue 11/24/09	Tue 1/28/10
53	Determine software deployment strategy	1 day	Mon 11/23/09	Mon 11/23/09
54	Acrofit Data	18 days	Tue 12/15/09	Mon 1/11/10
55	Configure Data Migrator to extract data from mainframe system (OSCAR)	15 days	Tue 12/15/09	Fri 1/8/10
56	Run initial daily Import and train agency staff	1 day	Mon 1/11/10	Mon 1/11/10
57	Agency Running Daily Data Import	0 days	Mon 1/11/10	Mon 1/11/10
58	Taxonomy Development	26 days	Mon 11/23/09	Thu 1/21/09
59	Prepare for taxonomy meeting	1 day	Mon 11/23/09	Mon 11/23/09
60	Hold taxonomy meeting	3 days	Fri 11/26/09	Tue 11/24/09
61	Assist customer with reviewing and finalizing taxonomy	10 days	Wed 11/25/09	Thu 12/10/09
62	Taxonomy Finalized	0 days	Thu 12/10/09	Thu 12/10/09
63	Configure Document Groups and Types	3 days	Tue 12/15/09	Thu 12/17/09
64	Business Requirements	44 days	Tue 11/17/09	Tue 1/28/10
65	Client Management	37 days	Tue 11/17/09	Thu 1/14/10
66	Hold interviews with SME's to determine business requirements	3 days	Thu 11/19/09	Mon 11/23/09
67	Develop business requirements analysis	8 days	Tue 11/17/09	Mon 11/30/09
68	Document functional specifications	3 days	Tue 11/24/09	Mon 11/30/09
69	Complete preliminary Client Management software configuration	3 days	Tue 11/24/09	Thu 1/14/10
70	Document Imaging	41 days	Fri 11/20/09	Tue 1/28/10
71	Hold interviews with SME's to determine business requirements	20 days	Wed 11/25/09	Mon 12/28/09
72	Develop business requirements analysis	26 days	Fri 11/20/09	Mon 1/4/10
73	Document functional specifications	5 days	Wed 12/23/09	Mon 1/4/10
74	Complete Preliminary Document Imaging software configuration	10 days	Tue 11/24/09	Tue 1/28/10
75	Preliminary Software Configuration Complete	0 days	Tue 1/28/10	Tue 1/28/10
76	Infrastructure Complete	105 days	Tue 1/28/10	Tue 1/28/10
77	Validation	29 days	Thu 1/14/2009	Tue 4/20/10
78	Local Test Environment (Marion)	1 day	Mon 11/30/09	Mon 11/30/09
79	Perform site survey	1 day	Tue 12/1/09	Tue 12/1/09
80	Order test environment hardware (server and workstation)	5 days	Tue 12/15/09	Mon 12/21/09
81	Inventory test environment hardware	10 days	Tue 12/29/09	Wed 1/13/10
82	Setup and configure test environment hardware and software	48 days	Thu 1/12/09	Thu 1/28/10
83	Client Management (CM) Validation	44 days	Thu 1/12/09	Fri 1/22/10
84	CM User Acceptance Testing (UAT)	5 days	Thu 1/12/09	Thu 1/19/09
85	Prepare test plan	1 day	Fri 11/20/09	Fri 11/20/09
86	Review test plan with agency project manager	1 day	Fri 11/20/09	Fri 11/20/09
87	Develop test scripts	3 days	Mon 11/23/09	Wed 11/25/09



ID	Task Name	Duration	Start	Finish
88	Prepare for CM UAT training	3 days	Wed 1/13/10	Fri 1/15/10
89	Deliver training for UAT team	1 day	Tue 1/19/10	Tue 1/19/10
90	Support UAT and document test results	3 days	Wed 1/20/10	Fri 1/22/10
91	Revise preliminary CM software configuration	4 days	Wed 1/20/10	Mon 1/25/10
92	CM Prototype Review	2 days	Tue 1/26/10	Wed 1/27/10
93	Prepare for AM prototype review	1 day	Tue 1/26/10	Tue 1/26/10
94	Hold CM prototype review	1 day	Wed 1/27/10	Wed 1/27/10
95	Finalize CM software configuration	1 day	Thu 1/28/10	Thu 1/28/10
96	CM Authorization to Proceed	0 days	Thu 1/28/10	Thu 1/28/10
97	Document Imaging (DI) Pilot Implementation (Phase 1)	5 days	Wed 1/27/10	Tue 2/2/10
98	Marion County	26 days	Wed 1/27/10	Thu 3/4/10
99	Hardware	13 days	Wed 1/27/10	Fri 2/12/10
100	Order hardware	1 day	Wed 1/27/10	Wed 1/27/10
101	Inventory hardware	5 days	Thu 2/4/10	Wed 2/10/10
102	Install hardware	2 days	Thu 2/11/10	Fri 2/12/10
103	Rollout	19 days	Fri 2/5/10	Thu 3/4/10
104	Deploy software and add users to configuration	3 days	Tue 2/16/10	Thu 2/18/10
105	Prepare for training	3 days	Fri 2/5/10	Tue 2/9/10
106	Deliver training	2 days	Fri 2/19/10	Mon 2/22/10
107	Provide in-unit rollout support	10 days	Fri 2/19/10	Thu 3/4/10
108	Revise preliminary DI software configuration	23 days	Tue 2/16/10	Thu 3/18/10
109	Monongalia County	15 days	Tue 2/16/10	Thu 3/4/10
110	Hardware	1 day	Tue 2/16/10	Tue 2/16/10
111	Order hardware	5 days	Wed 2/24/10	Tue 3/2/10
112	Inventory hardware	2 days	Wed 3/3/10	Thu 3/4/10
113	Install hardware	18 days	Tue 3/2/10	Thu 3/18/10
114	Rollout	2 days	Fri 3/5/10	Mon 3/8/10
115	Deploy software and add users to configuration	3 days	Tue 3/2/10	Thu 3/4/10
116	Prepare for training	2 days	Tue 3/9/10	Wed 3/10/10
117	Deliver training	8 days	Tue 3/9/10	Thu 3/18/10
118	Provide in-unit rollout support	8 days	Tue 3/9/10	Thu 3/18/10
119	Revise preliminary DI software configuration	23 days	Fri 2/26/10	Tue 3/30/10
120	Erason County	14 days	Fri 2/26/10	Wed 3/17/10
121	Hardware	1 day	Fri 2/26/10	Fri 2/26/10
122	Order hardware	5 days	Mon 3/8/10	Fri 3/12/10
123	Inventory hardware	3 days	Mon 3/15/10	Wed 3/17/10
124	Install hardware	11 days	Tue 3/16/10	Wed 3/30/10
125	Rollout	2 days	Thu 3/18/10	Fri 3/19/10
126	Deploy software and add users to configuration	3 days	Tue 3/16/10	Thu 3/18/10
127	Prepare for training	2 days	Mon 3/22/10	Tue 3/23/10
128	Deliver training	7 days	Mon 3/22/10	Tue 3/30/10
129	Provide in-unit rollout support	7 days	Mon 3/22/10	Tue 3/30/10
130	Revise preliminary DI software configuration	22 days	Tue 3/9/10	Wed 4/7/10
131	Logan County	14 days	Tue 3/9/10	Fri 3/26/10
132	Hardware			



ID	Task Name	Duration	Start	Finish	Group By Summary	Deadline
133	Order hardware	1 day	Tue 3/9/10	Tue 3/9/10		
134	Inventory hardware	5 days	Wed 3/17/10	Tue 3/23/10		
135	Install hardware	3 days	Wed 3/24/10	Fri 3/26/10		
136	Rollout	9 days	Fri 3/26/10	Wed 4/7/10		
137	Deploy software and add users to configuration	2 days	Mon 3/29/10	Tue 3/30/10		
138	Prepare for training	3 days	Fri 3/26/10	Tue 4/1/10		
139	Deliver training	2 days	Wed 3/31/10	Thu 4/1/10		
140	Provide in-unit rollout support	6 days	Wed 3/31/10	Wed 4/7/10		
141	Revise preliminary DI software configuration	3 days	Wed 4/7/10	Wed 4/7/10		
142	Final Prototype Review	1 day	Wed 4/7/10	Thu 4/8/10		
143	Prepare for DI prototype review	7 days	Mon 4/12/10	Tue 4/20/10		
144	Hold DI prototype review	5 days	Mon 4/12/10	Fri 4/16/10		
145	Review and signoff on DI system configuration	1 day	Mon 4/19/10	Mon 4/19/10		
146	Finalize DI configuration	0 days	Tue 4/20/10	Tue 4/20/10		
147	Hold phase gate review for DI pilot implementation	155 days	Fri 11/20/09	Thu 7/8/10		
148	DI Authorization to Proceed	54 days	Fri 11/20/09	Fri 2/12/10		
149	Implementation	34 days	Fri 11/20/09	Thu 1/14/10		
150	Client Management (CM) implementation (Phase 2)	1 day	Thu 1/14/10	Thu 1/14/10		
151	Marion County Hardware	1 day	Wed 1/27/10	Tue 2/8/10		
152	Order self check-in kiosk	3 days	Wed 1/27/10	Thu 1/28/10		
153	Install and configure self check-in kiosk	1 day	Fri 1/29/10	Fri 1/29/10		
154	Rollout	7 days	Mon 2/1/10	Tue 2/9/10		
155	Deliver software and add users to configuration	1 day	Wed 2/3/10	Wed 2/3/10		
156	Prepare for training	1 day	Thu 2/4/10	Thu 2/4/10		
157	Deliver training	53 days	Fri 11/20/09	Thu 2/11/10		
158	Provide in-unit rollout support	19 days	Fri 11/20/09	Fri 12/18/09		
159	Deliver supervisor training	2 days	Wed 12/16/09	Thu 12/17/09		
160	Deliver system administration training	1 day	Fri 12/18/09	Fri 12/18/09		
161	Berkeley County Hardware	10 days	Fri 1/29/10	Thu 2/11/10		
162	Order server and self check-in kiosk	2 days	Fri 1/29/10	Mon 2/1/10		
163	Install and configure server	3 days	Fri 1/29/10	Mon 2/1/10		
164	Rollout	1 day	Tue 2/2/10	Tue 2/2/10		
165	Deploy software and add users to configuration	7 days	Wed 2/3/10	Thu 2/11/10		
166	Prepare for training	1 day	Fri 2/5/10	Fri 2/5/10		
167	Deliver training	53 days	Mon 2/8/10	Mon 2/8/10		
168	Provide in-unit rollout support	4 days	Fri 11/20/09	Wed 11/25/09		
169	Deliver supervisor training	1 day	Fri 11/20/09	Fri 11/20/09		
170	Deliver system administration training	1 day	Fri 11/20/09	Fri 11/20/09		
171	Order server and self check-in kiosk	1 day	Fri 11/20/09	Fri 11/20/09		
172	Install and configure self check-in kiosk	1 day	Fri 11/20/09	Fri 11/20/09		
173	Rollout	1 day	Fri 11/20/09	Fri 11/20/09		
174	Deploy software and add users to configuration	1 day	Fri 11/20/09	Fri 11/20/09		
175	Prepare for training	1 day	Fri 11/20/09	Fri 11/20/09		
176	Deliver training	1 day	Fri 11/20/09	Fri 11/20/09		
177	Provide in-unit rollout support	1 day	Fri 11/20/09	Fri 11/20/09		
178	Deliver supervisor training	1 day	Fri 11/20/09	Fri 11/20/09		
179	Deliver system administration training	1 day	Fri 11/20/09	Fri 11/20/09		
180	Order server and self check-in kiosk	1 day	Fri 11/20/09	Fri 11/20/09		





ID	Task Name	Duration	Start	Finish
178	Install and configure server	2 days	Mon 11/23/09	Tue 11/24/09
179	Install and configure self check-in kiosk	1 day	Wed 11/25/09	Thu 11/25/09
180	Rollout	10 days	Fri 11/26/09	Mon 12/14/09
181	Deploy software and add users to configuration	2 days	Mon 11/29/10	Wed 12/01/10
182	Prepare for training	3 days	Thu 12/02/10	Fri 12/03/10
183	Deliver training	1 day	Fri 12/03/10	Mon 12/06/10
184	Provide in-unit rollout support	4 days	Mon 12/06/10	Thu 12/09/10
185	Deliver supervisor training	1 day	Wed 12/08/10	Thu 12/09/10
186	Deliver system administration training	1 day	Thu 12/09/10	Thu 12/09/10
187	Revise preliminary CM software configuration	9 days	Mon 12/13/10	Mon 12/20/10
188	Hold phase gate review for CM implementation	1 day	Fri 12/17/10	Fri 12/17/10
189	CM Implementation Complete	0 days	Fri 12/17/10	Fri 12/17/10
190	Document Management (D) Statewide Implementation (Phase 3)	74 days	Wed 3/24/10	Wed 7/7/10
191	Provide system administration training	5 days	Mon 4/12/10	Fri 4/16/10
192	Karawine (SDU) (108)	36 days	Wed 3/24/10	Wed 5/12/10
193	Hardware	13 days	Mon 4/12/10	Fri 4/16/10
194	Order hardware	1 day	Wed 3/24/10	Wed 3/24/10
195	Inventory hardware	5 days	Thu 4/1/10	Wed 4/7/10
196	Install hardware	2 days	Thu 4/8/10	Fri 4/9/10
197	Rollout	23 days	Mon 4/12/10	Wed 5/12/10
198	Deploy software and add users to configuration	3 days	Mon 4/19/10	Wed 4/21/10
199	Prepare for training	3 days	Mon 4/19/10	Wed 4/21/10
200	Deliver training	11 days	Wed 4/21/10	Wed 5/5/10
201	Provide in-unit rollout support	16 days	Wed 4/21/10	Wed 5/12/10
202	Rollout Team A	62 days	Mon 4/5/10	Wed 6/30/10
203	Rosens (4)	32 days	Mon 4/5/10	Tue 5/18/10
204	Hardware	13 days	Mon 4/5/10	Wed 4/21/10
205	Order hardware	1 day	Mon 4/5/10	Mon 4/5/10
206	Inventory hardware	5 days	Mon 4/12/10	Mon 4/19/10
207	Install hardware	2 days	Tue 4/20/10	Wed 4/21/10
208	Rollout	19 days	Thu 4/22/10	Tue 5/18/10
209	Deploy software and add users to configuration	1 day	Thu 4/22/10	Thu 4/22/10
210	Prepare for training	3 days	Mon 5/10/10	Wed 5/12/10
211	Deliver training	1 day	Wed 5/12/10	Wed 5/12/10
212	Provide in-unit rollout support	4 days	Thu 5/13/10	Mon 5/24/10
213	Boone (10)	27 days	Fri 4/16/10	Mon 5/24/10
214	Hardware	13 days	Fri 4/16/10	Tue 5/4/10
215	Order hardware	1 day	Fri 4/16/10	Fri 4/16/10
216	Inventory hardware	5 days	Mon 4/26/10	Fri 4/30/10
217	Install hardware	2 days	Mon 5/3/10	Tue 5/4/10
218	Rollout	14 days	Wed 5/5/10	Mon 5/24/10
219	Deploy software and add users to configuration	1 day	Wed 5/5/10	Wed 5/5/10
220	Prepare for training	3 days	Fri 5/14/10	Tue 5/18/10
221	Deliver training	1 day	Tue 5/18/10	Tue 5/18/10
222	Provide in-unit rollout support	4 days	Wed 5/19/10	Mon 5/24/10

Project: Document Imaging System an  
 Date: Fri 8/28/09

Summary  
 Relieved Up Task  
 Relieved Up Critical Task  
 Relieved Up Milestone

Task  
 Critical Task  
 Progress  
 Milestone

Relieved Up Progress  
 Split  
 External Tasks  
 Project Summary

Group By Summary  
 Deadline





ID	Task Name	Task	Duration	Start	Finish
266	Rollout	Rollout	7 days	Wed 6/16/10	Thu 6/24/10
267	Deploy software and add users to configuration	Task	1 day	Fri 6/18/10	Fri 6/18/10
268	Prepare for training	Task	3 days	Wed 6/16/10	Fri 6/18/10
270	Deliver training	Task	1 day	Mon 6/21/10	Mon 6/21/10
271	Provide in-unit rollout support	Task	3 days	Tue 6/22/10	Thu 6/24/10
272	Mason (0)	Milestone	18 days	Wed 6/23/10	Fri 6/18/10
273	Hardware	Task	13 days	Wed 6/23/10	Fri 6/18/10
274	Order hardware	Task	1 day	Wed 6/23/10	Wed 6/23/10
275	Inventory hardware	Task	5 days	Thu 6/10/10	Wed 6/16/10
276	Install hardware	Task	2 days	Thu 6/17/10	Fri 6/18/10
277	Hancock (10)	Milestone	20 days	Thu 6/3/10	Fri 6/18/10
278	Hardware	Task	14 days	Thu 6/3/10	Tue 6/22/10
279	Order hardware	Task	1 day	Thu 6/3/10	Thu 6/3/10
280	Inventory hardware	Task	5 days	Thu 6/17/10	Thu 6/17/10
281	Install hardware	Task	2 days	Fri 6/11/10	Tue 6/22/10
282	Rollout	Rollout	7 days	Mon 6/21/10	Wed 6/30/10
283	Deploy software and add users to configuration	Task	1 day	Tue 6/22/10	Wed 6/23/10
284	Prepare for training	Task	3 days	Tue 6/22/10	Thu 6/24/10
285	Deliver training	Task	1 day	Thu 6/24/10	Thu 6/24/10
286	Provide in-unit rollout support	Task	4 days	Fri 6/25/10	Wed 6/30/10
287	Rollout Team B	Milestone	67 days	Fri 4/23/10	Wed 7/7/10
288	Raleigh (18)	Milestone	34 days	Fri 4/23/10	Wed 5/19/10
289	Hardware	Task	13 days	Fri 4/23/10	Wed 5/19/10
290	Order hardware	Task	1 day	Fri 4/23/10	Fri 4/23/10
291	Inventory hardware	Task	5 days	Mon 4/19/10	Tue 4/20/10
292	Install hardware	Task	2 days	Mon 4/19/10	Fri 4/16/10
293	Rollout	Rollout	21 days	Wed 4/21/10	Wed 5/19/10
294	Deploy software and add users to configuration	Task	1 day	Wed 4/21/10	Wed 4/21/10
295	Prepare for training	Task	3 days	Mon 5/10/10	Wed 5/12/10
296	Deliver training	Task	5 days	Wed 5/12/10	Fri 5/14/10
297	Provide in-unit rollout support	Task	5 days	Thu 5/13/10	Wed 5/19/10
298	Mercer (19)	Milestone	35 days	Thu 4/29/10	Wed 5/26/10
299	Hardware	Task	13 days	Thu 4/29/10	Wed 5/26/10
300	Order hardware	Task	1 day	Thu 4/29/10	Thu 4/29/10
301	Inventory hardware	Task	5 days	Fri 4/16/10	Thu 4/22/10
302	Install hardware	Task	2 days	Fri 4/23/10	Mon 4/26/10
303	Rollout	Rollout	22 days	Tue 4/27/10	Wed 5/26/10
304	Deploy software and add users to configuration	Task	1 day	Tue 4/27/10	Tue 4/27/10
305	Prepare for training	Task	3 days	Mon 5/17/10	Wed 5/19/10
306	Deliver training	Task	3 days	Wed 5/19/10	Fri 5/21/10
307	Provide in-unit rollout support	Task	5 days	Thu 5/20/10	Wed 5/26/10
308	Summers (1)	Milestone	33 days	Thu 4/13/10	Thu 5/27/10
309	Hardware	Task	13 days	Tue 4/13/10	Thu 4/29/10
310	Order hardware	Task	1 day	Tue 4/13/10	Tue 4/13/10
311					

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Task: Critical Task, Progress, Milestone

Summary: Summary, Rolled Up Task, Rolled Up Critical Task, Rolled Up Milestone

Group By: Summary, Deadline

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ID	Task Name	Duration	Start	Finish
312	Inventory hardware	5 days	Wed 4/21/10	Tue 4/27/10
313	Install hardware	2 days	Thu 4/29/10	Thu 4/29/10
314	Rollout	20 days	Fri 4/30/10	Thu 5/27/10
315	Deploy software and add users to configuration	1 day	Fri 4/30/10	Fri 4/30/10
316	Prepare for training	3 days	Mon 5/24/10	Wed 5/26/10
317	Deliver training	1 day	Thu 5/27/10	Thu 5/27/10
318	Provide in-unit rollout support	13 days	Wed 4/14/10	Wed 4/14/10
319	Hardware	13 days	Wed 4/14/10	Wed 4/28/10
320	Order hardware	1 day	Thu 4/22/10	Thu 4/22/10
321	Inventory hardware	5 days	Thu 4/29/10	Fri 4/30/10
322	Install hardware	2 days	Thu 4/15/10	Tue 5/4/10
323	Pleasant's (0)	14 days	Thu 4/15/10	Tue 5/4/10
324	Hardware	14 days	Thu 4/15/10	Tue 5/4/10
325	Order hardware	1 day	Thu 4/15/10	Thu 4/15/10
326	Inventory hardware	5 days	Fri 4/23/10	Thu 4/29/10
327	Install hardware	2 days	Mon 5/3/10	Tue 5/4/10
328	Hardware	35 days	Fri 4/16/10	Fri 6/4/10
329	Order hardware	15 days	Fri 4/16/10	Thu 5/6/10
330	Inventory hardware	1 day	Fri 4/16/10	Fri 4/16/10
331	Install hardware	5 days	Mon 4/26/10	Fri 4/30/10
332	Rollout	20 days	Wed 5/5/10	Thu 5/6/10
333	Deploy software and add users to configuration	1 day	Fri 5/7/10	Fri 5/7/10
334	Prepare for training	9 days	Tue 5/25/10	Tue 6/1/10
335	Deliver training	3 days	Thu 5/27/10	Thu 6/3/10
336	Provide in-unit rollout support	5 days	Fri 5/28/10	Fri 6/4/10
337	Hardware	16 days	Mon 4/19/10	Mon 5/10/10
338	Order hardware	1 day	Mon 4/19/10	Mon 5/10/10
339	Inventory hardware	5 days	Tue 4/27/10	Mon 5/3/10
340	Install hardware	2 days	Fri 5/7/10	Mon 5/10/10
341	Hardware	17 days	Tue 4/20/10	Wed 5/12/10
342	Order hardware	1 day	Tue 4/20/10	Wed 5/12/10
343	Inventory hardware	5 days	Tue 4/20/10	Tue 4/20/10
344	Install hardware	2 days	Wed 4/28/10	Tue 5/4/10
345	Hardware	2 days	Tue 5/11/10	Wed 5/12/10
346	Order hardware	18 days	Wed 4/21/10	Fri 5/14/10
347	Inventory hardware	1 day	Wed 4/21/10	Wed 4/21/10
348	Install hardware	5 days	Thu 4/29/10	Wed 5/5/10
349	Hardware	2 days	Thu 5/13/10	Fri 5/14/10
350	Order hardware	36 days	Thu 4/22/10	Fri 6/11/10
351	Inventory hardware	19 days	Thu 4/22/10	Tue 5/18/10
352	Install hardware			
353	Hardware			
354				
355				



ID	Task Name	Duration	Start	Finish	Group By Summary	Deadline
356	Order hardware	1 day	Thu 4/22/10	Thu 4/22/10		
357	Inventory hardware	5 days	Fri 4/30/10	Thu 5/6/10		
358	Install hardware	2 days	Mon 5/17/10	Tue 5/18/10		
359	Rollout	17 days	Mon 5/17/10	Fri 6/11/10		
360	Deploy software and add users to configuration	1 day	Wed 5/19/10	Wed 5/19/10		
361	Prepare for training	3 days	Wed 5/19/10	Fri 6/4/10		
362	Deliver training	3 days	Fri 6/4/10	Tue 6/8/10		
363	Provide in-unit rollout support	5 days	Mon 6/7/10	Fri 6/11/10		
364	Jefferson (4)	38 days	Fri 4/23/10	Wed 6/16/10		
365	Hardware	13 days	Fri 4/23/10	Tue 5/11/10		
366	Order hardware	1 day	Fri 4/23/10	Fri 4/23/10		
367	Inventory hardware	5 days	Mon 5/3/10	Fri 5/7/10		
368	Install hardware	2 days	Mon 5/10/10	Tue 5/11/10		
369	Rollout	25 days	Wed 5/12/10	Wed 6/16/10		
370	Deploy software and add users to configuration	1 day	Wed 5/12/10	Wed 5/12/10		
371	Prepare for training	3 days	Wed 5/12/10	Fri 6/11/10		
372	Deliver training	1 day	Wed 5/12/10	Wed 5/12/10		
373	Provide in-unit rollout support	1 day	Wed 5/12/10	Fri 6/11/10		
374	Mingo (11)	40 days	Mon 6/14/10	Tue 8/22/10		
375	Hardware	13 days	Tue 4/27/10	Thu 5/13/10		
376	Order hardware	1 day	Tue 4/27/10	Tue 4/27/10		
377	Inventory hardware	5 days	Wed 5/5/10	Tue 5/11/10		
378	Install hardware	2 days	Wed 5/12/10	Thu 5/13/10		
379	Rollout	27 days	Fri 5/14/10	Tue 6/22/10		
380	Deploy software and add users to configuration	1 day	Fri 5/14/10	Fri 5/14/10		
381	Prepare for training	3 days	Mon 6/14/10	Wed 6/16/10		
382	Deliver training	1 day	Wed 6/16/10	Wed 6/16/10		
383	Provide in-unit rollout support	1 day	Wed 6/16/10	Wed 6/16/10		
384	Wyoming (9)	4 days	Thu 4/28/10	Fri 6/25/10		
385	Hardware	13 days	Wed 4/28/10	Fri 5/14/10		
386	Order hardware	1 day	Wed 4/28/10	Wed 4/28/10		
387	Inventory hardware	5 days	Thu 5/6/10	Wed 5/12/10		
388	Install hardware	2 days	Thu 5/13/10	Fri 5/14/10		
389	Rollout	29 days	Mon 5/17/10	Fri 6/25/10		
390	Deploy software and add users to configuration	1 day	Mon 5/17/10	Mon 5/17/10		
391	Prepare for training	3 days	Fri 6/18/10	Tue 6/22/10		
392	Deliver training	1 day	Tue 6/22/10	Tue 6/22/10		
393	Provide in-unit rollout support	1 day	Tue 6/22/10	Tue 6/22/10		
394	McDowell (9)	44 days	Thu 4/29/10	Wed 6/30/10		
395	Hardware	17 days	Thu 4/29/10	Fri 5/21/10		
396	Order hardware	1 day	Thu 4/29/10	Thu 4/29/10		
397	Inventory hardware	5 days	Fri 5/7/10	Thu 5/13/10		
398	Install hardware	2 days	Thu 5/20/10	Fri 5/21/10		
399	Rollout	27 days	Mon 5/24/10	Wed 6/30/10		
400	Deploy software and add users to configuration	1 day	Mon 5/24/10	Mon 5/24/10		



ID	Task Name	Duration	Start	Finish
401	Prepare for training	3 days	Wed 6/25/10	Fri 6/25/10
402	Deliver training	1 day	Fri 6/25/10	Fri 6/25/10
403	Provide in-unit rollout support	3 days	Mon 6/28/10	Wed 7/7/10
404	Ohio (10)	13 days	Fri 6/4/10	Tue 6/22/10
405	Hardware	1 day	Fri 6/4/10	Fri 6/4/10
406	Order hardware	5 days	Mon 6/14/10	Fri 6/18/10
407	Inventory hardware	2 days	Mon 6/21/10	Tue 6/22/10
408	Install hardware	10 days	Wed 6/23/10	Wed 7/7/10
409	Rollout	1 day	Wed 6/23/10	Wed 6/23/10
410	Deploy software and add users to configuration	3 days	Mon 6/28/10	Wed 6/30/10
411	Prepare for training	1 day	Wed 6/30/10	Wed 6/30/10
412	Deliver training	4 days	Thu 7/1/10	Wed 7/7/10
413	Provide in-unit rollout support	60 days	Thu 3/25/10	Thu 6/17/10
414	Rollout Team C	13 days	Thu 3/25/10	Mon 4/12/10
415	Dodderidge (0)	13 days	Thu 3/25/10	Mon 4/12/10
416	Hardware	1 day	Thu 3/25/10	Thu 3/25/10
417	Order hardware	5 days	Fri 4/2/10	Thu 4/8/10
418	Inventory hardware	2 days	Fri 4/9/10	Mon 4/12/10
419	Install hardware	34 days	Fri 4/2/10	Wed 5/19/10
420	Harrison (18)	13 days	Fri 4/2/10	Tue 4/20/10
421	Hardware	1 day	Fri 4/2/10	Fri 4/2/10
422	Order hardware	5 days	Mon 4/12/10	Fri 4/16/10
423	Inventory hardware	2 days	Mon 4/19/10	Tue 4/20/10
424	Install hardware	21 days	Wed 4/21/10	Wed 5/19/10
425	Rollout	1 day	Wed 4/21/10	Wed 4/21/10
426	Deploy software and add users to configuration	3 days	Mon 5/10/10	Wed 5/12/10
427	Prepare for training	3 days	Wed 5/12/10	Fri 5/14/10
428	Deliver training	5 days	Thu 5/13/10	Wed 5/19/10
429	Provide in-unit rollout support	14 days	Mon 4/5/10	Thu 4/22/10
430	Barboor (0)	1 day	Mon 4/5/10	Thu 4/22/10
431	Hardware	1 day	Mon 4/5/10	Mon 4/5/10
432	Order hardware	5 days	Tue 4/13/10	Mon 4/19/10
433	Inventory hardware	2 days	Wed 4/21/10	Thu 4/22/10
434	Install hardware	36 days	Tue 4/6/10	Tue 5/25/10
435	Hardy (3)	15 days	Tue 4/6/10	Mon 4/26/10
436	Hardware	1 day	Tue 4/6/10	Tue 4/6/10
437	Order hardware	5 days	Wed 4/14/10	Tue 4/20/10
438	Inventory hardware	2 days	Fri 4/23/10	Mon 4/26/10
439	Install hardware	21 days	Tue 4/27/10	Tue 5/25/10
440	Rollout	1 day	Tue 4/27/10	Tue 4/27/10
441	Deploy software and add users to configuration	3 days	Mon 5/17/10	Wed 5/19/10
442	Prepare for training	1 day	Wed 5/19/10	Wed 5/19/10
443	Deliver training	4 days	Thu 5/20/10	Tue 5/25/10
444	Provide in-unit rollout support			

Project: Document Imaging System an  
 Date: Fri 6/25/09

Task: Task, Critical Task, Progress, Milestone

Summary: Summary, Rolled Up Task, Rolled Up Critical Task, Rolled Up Milestone

Group By Summary: Group By Summary, Deadline

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ID	Task Name	Duration	Start	Finish
445	Hampshire (7) Hardware	34 days	Wed 4/14/10	Tue 6/17/10
446	Order hardware	1 day	Wed 4/14/10	Fri 4/23/10
447	Inventory hardware	5 days	Thu 4/22/10	Wed 4/28/10
448	Install hardware	2 days	Thu 4/29/10	Fri 4/30/10
449	Rollout	21 days	Mon 5/3/10	Tue 6/1/10
450	Deploy software and add users to configuration	1 day	Mon 5/3/10	Mon 5/3/10
451	Prepare for training	3 days	Fri 5/21/10	Tue 5/25/10
452	Deliver training	1 day	Tue 5/25/10	Tue 5/25/10
453	Provides in-unit rollout support	4 days	Wed 5/26/10	Tue 6/1/10
454	Hardware	31 days	Wed 5/26/10	Mon 6/7/10
455	Order hardware	13 days	Fri 4/23/10	Tue 5/11/10
456	Inventory hardware	1 day	Fri 4/23/10	Fri 4/23/10
457	Install hardware	5 days	Mon 5/3/10	Fri 5/7/10
458	Rollout	2 days	Mon 5/10/10	Tue 5/11/10
459	Deploy software and add users to configuration	18 days	Wed 5/12/10	Mon 6/7/10
460	Prepare for training	1 day	Wed 5/12/10	Wed 5/12/10
461	Deliver training	3 days	Thu 5/27/10	Tue 6/1/10
462	Provides in-unit rollout support	1 day	Tue 6/1/10	Tue 6/1/10
463	Hardware	4 days	Wed 6/2/10	Mon 6/7/10
464	Order hardware	14 days	Mon 4/26/10	Thu 5/13/10
465	Inventory hardware	1 day	Mon 4/26/10	Mon 4/26/10
466	Install hardware	5 days	Mon 4/26/10	Mon 5/10/10
467	Rollout	2 days	Tue 5/12/10	Thu 5/13/10
468	Deploy software and add users to configuration	33 days	Wed 4/27/10	Fri 6/11/10
469	Prepare for training	15 days	Tue 4/27/10	Mon 5/17/10
470	Deliver training	1 day	Tue 4/27/10	Tue 4/27/10
471	Provides in-unit rollout support	5 days	Wed 5/5/10	Tue 5/11/10
472	Hardware	2 days	Fri 5/14/10	Mon 5/17/10
473	Order hardware	18 days	Tue 5/18/10	Fri 6/11/10
474	Inventory hardware	1 day	Tue 5/18/10	Tue 5/18/10
475	Install hardware	3 days	Thu 6/3/10	Mon 6/7/10
476	Rollout	4 days	Tue 6/8/10	Tue 6/8/10
477	Deploy software and add users to configuration	13 days	Wed 5/5/10	Fri 5/21/10
478	Prepare for training	1 day	Wed 5/5/10	Wed 5/5/10
479	Deliver training	5 days	Thu 5/13/10	Wed 5/19/10
480	Provides in-unit rollout support	2 days	Thu 5/20/10	Fri 5/21/10
481	Hardware	18 days	Mon 5/24/10	Thu 6/17/10
482	Order hardware	1 day	Mon 5/24/10	Mon 5/24/10
483	Inventory hardware	3 days	Wed 6/9/10	Fri 6/11/10
484	Install hardware	1 day	Wed 6/9/10	Fri 6/11/10
485	Rollout	4 days	Fri 6/11/10	Thu 6/17/10
486	Deploy software and add users to configuration	1 day	Wed 6/9/10	Fri 6/11/10
487	Prepare for training	1 day	Fri 6/11/10	Fri 6/11/10
488	Deliver training	1 day	Fri 6/11/10	Fri 6/11/10
489	Provides in-unit rollout support	4 days	Mon 6/14/10	Thu 6/17/10

Project: Document Imaging System an  
 Date: Fri 6/25/09

Task: Critical Task, Progress, Milestone

Summary, Rolled Up Task, Rolled Up Critical Task, Rolled Up Milestone

Group By Summary, Deadline

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ID	Task Name	Duration	Start	Finish
534	Deliver training	1 day	Mon 5/24/10	Mon 5/24/10
535	Provide in-unit rollout support	4 days	Tue 5/25/10	Fri 5/28/10
536	Upshur (0)	14 days	Thu 4/22/10	Tue 5/11/10
537	Hardware	1 day	Thu 4/22/10	Thu 4/22/10
538	Order hardware	5 days	Fri 4/30/10	Thu 5/6/10
539	Inventory hardware	2 days	Mon 5/10/10	Tue 5/11/10
540	Install hardware	15 days	Fri 4/23/10	Thu 5/13/10
541	Webster (0)	1 day	Fri 4/23/10	Thu 5/13/10
542	Hardware	5 days	Mon 5/3/10	Fri 5/7/10
543	Order hardware	2 days	Wed 5/12/10	Thu 5/13/10
544	Inventory hardware	18 days	Mon 4/26/10	Mon 5/17/10
545	Install hardware	1 day	Mon 4/26/10	Mon 4/26/10
546	Pocahontas (0)	5 days	Tue 5/4/10	Mon 5/10/10
547	Hardware	2 days	Fri 5/14/10	Mon 5/17/10
548	Order hardware	28 days	Tue 4/27/10	Fri 6/4/10
549	Inventory hardware	1 day	Tue 4/27/10	Tue 4/27/10
550	Install hardware	5 days	Wed 5/5/10	Tue 5/11/10
551	Pendleton (3)	2 days	Tue 5/18/10	Tue 5/19/10
552	Hardware	11 days	Thu 5/20/10	Fri 6/4/10
553	Order hardware	1 day	Wed 5/26/10	Fri 5/28/10
554	Inventory hardware	1 day	Fri 5/28/10	Fri 5/28/10
555	Install hardware	4 days	Tue 5/17/10	Fri 6/4/10
556	Order hardware	18 days	Wed 4/28/10	Fri 5/21/10
557	Inventory hardware	1 day	Wed 4/28/10	Wed 4/28/10
558	Install hardware	5 days	Thu 5/6/10	Wed 5/12/10
559	Taylor (0)	2 days	Thu 5/20/10	Fri 5/21/10
560	Hardware	19 days	Thu 4/29/10	Tue 5/25/10
561	Order hardware	1 day	Thu 4/29/10	Thu 4/29/10
562	Inventory hardware	5 days	Fri 5/7/10	Thu 5/13/10
563	Install hardware	2 days	Mon 5/24/10	Tue 5/25/10
564	Tucker (0)	20 days	Fri 4/30/10	Thu 5/27/10
565	Hardware	1 day	Fri 4/30/10	Fri 4/30/10
566	Order hardware	5 days	Mon 5/10/10	Fri 5/14/10
567	Inventory hardware	2 days	Wed 5/26/10	Thu 5/27/10
568	Install hardware	9 days	Tue 6/1/10	Fri 6/11/10
569	Rollout	9 days	Tue 6/1/10	Fri 6/11/10
570	Order hardware	18 days	Wed 4/28/10	Fri 5/21/10
571	Inventory hardware	1 day	Wed 4/28/10	Wed 4/28/10
572	Install hardware	5 days	Thu 5/6/10	Wed 5/12/10
573	Taylor (0)	2 days	Thu 5/20/10	Fri 5/21/10
574	Hardware	19 days	Thu 4/29/10	Tue 5/25/10
575	Order hardware	1 day	Thu 4/29/10	Thu 4/29/10
576	Inventory hardware	5 days	Fri 5/7/10	Thu 5/13/10
577	Install hardware	2 days	Mon 5/24/10	Tue 5/25/10
578	Rollout	20 days	Fri 4/30/10	Thu 5/27/10
579	Order hardware	1 day	Fri 4/30/10	Fri 4/30/10
580	Inventory hardware	5 days	Mon 5/10/10	Fri 5/14/10
581	Install hardware	2 days	Wed 5/26/10	Thu 5/27/10
582	Kanawha (Field Office)(48)	9 days	Tue 6/1/10	Fri 6/11/10
583	Rollout	9 days	Tue 6/1/10	Fri 6/11/10

Project: Document Imaging System an  
 Date: Fri 6/23/09

Task: Critical Task  
 Progress:   
 Milestone:

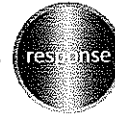
Summary:   
 Rolled Up Task:   
 Rolled Up Critical Task:   
 Rolled Up Milestone:

Group By Summary:   
 Deadline:

Project Summary:

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ID	Task Name	Duration	Start	Finish
578	Deploy software and add users to configuration	1 day	Tue 6/1/10	Tue 6/1/10
579	Prepare for training	3 days	Wed 6/2/10	Fri 6/4/10
580	Deliver training	2 days	Fri 6/4/10	Mon 6/7/10
581	Provide in-unit rollout support	5 days	Mon 6/7/10	Fri 6/11/10
582	Marshal (10)	33 days	Mon 6/7/10	Thu 6/17/10
583	Hardware	19 days	Mon 6/9/10	Wed 6/16/10
584	Order hardware	1 day	Mon 6/9/10	Mon 6/9/10
585	Inventory hardware	5 days	Tue 6/11/10	Mon 6/14/10
586	Install hardware	2 days	Wed 6/12/10	Thu 6/13/10
587	Rollout	20 days	Thu 6/17/10	Thu 6/24/10
588	Deploy software and add users to configuration	1 day	Thu 6/24/10	Thu 6/24/10
589	Prepare for training	3 days	Wed 6/30/10	Fri 6/11/10
590	Deliver training	1 day	Fri 6/11/10	Fri 6/11/10
591	Provide in-unit rollout support	4 days	Mon 6/14/10	Thu 6/17/10
592	Wetzel (6)	20 days	Wed 6/23/10	Tue 6/22/10
593	Hardware	13 days	Wed 6/23/10	Fri 6/28/10
594	Order hardware	1 day	Wed 6/23/10	Wed 6/23/10
595	Inventory hardware	5 days	Thu 6/24/10	Fri 6/28/10
596	Install hardware	2 days	Thu 6/24/10	Fri 6/28/10
597	Rollout	16 days	Tue 6/22/10	Tue 6/22/10
598	Deploy software and add users to configuration	1 day	Tue 6/22/10	Tue 6/22/10
599	Prepare for training	3 days	Tue 6/22/10	Thu 6/24/10
600	Deliver training	1 day	Tue 6/22/10	Tue 6/22/10
601	Provide in-unit rollout support	0 days	Thu 7/8/10	Thu 7/8/10
602	Hold phase gate review for DI statewide implementation	0 days	Thu 7/8/10	Thu 7/8/10
603	DI statewide implementation Complete	190 days	Mon 10/19/09	Mon 7/26/10
604	Closure	1 day	Fri 7/9/10	Fri 7/9/10
605	Establish customer portal account	1 day	Fri 7/9/10	Fri 7/9/10
606	Update issues log	2 days	Tue 7/13/10	Tue 7/13/10
607	Review deliverables and outstanding issues	2.5 days	Wed 7/14/10	Fri 7/16/10
608	Closure Report	2 days	Wed 7/14/10	Thu 7/15/10
609	Prepare project closure report	0.5 days	Fri 7/16/10	Fri 7/16/10
610	Review project closure report for sponsor signoff	0.5 days	Fri 7/16/10	Fri 7/16/10
611	Project Acceptance	0 days	Fri 7/16/10	Fri 7/16/10
612	Review maintenance & support plan with customer	184 days	Mon 10/19/09	Fri 7/16/10
613	Post Project Surveys	1 day	Fri 7/9/10	Fri 7/9/10
614	Distribute post project surveys to Northwoods project team	2 days	Mon 10/19/09	Tue 10/20/09
615	Distribute post project surveys to customer	2 days	Thu 7/15/10	Fri 7/16/10
616	Compile survey results	3 days	Mon 7/19/10	Wed 7/21/10
617	Prepare project implementation & evaluation report (PIER)	1 day	Thu 7/22/10	Thu 7/22/10
618	Archive project document ation	1 day	Mon 7/26/10	Mon 7/26/10
619	Provide feedback and release project team	0 days	Mon 7/26/10	Mon 7/26/10
620	Project Complete	0 days	Mon 7/26/10	Mon 7/26/10



## 4.13 Technical Environment Requirements

The proposed system will reside on DHHR's existing network infrastructure. In order to minimize deployment barriers and reduce costs, Northwoods engineers require local and remote (VPN or Hamachi) network access across network system servers, client computers, and image file shares, as well as Local Administrator authority on each designated client or server for the duration of the project and ongoing maintenance and support. A network account must be created for Northwoods engineers, to be used for configuration and review of Compass and application software installed on client and server computers.

During the project, it is the responsibility of DHHR MIS to acquire and maintain the proper licenses for prerequisite software required to support the Document Management Solution, such as operating systems, Microsoft SQL Server and required CALs. Northwoods engineers will recommend a backup and disaster recovery procedure and provide recommendations on network/infrastructure changes needed to support the Document Management Solution according to the Work Requirements described above. DHHR MIS is responsible for performing daily backups of all related systems, database, and data files and maintaining current backed-up copies of other pertinent systems and data files.



## 5 Bid Sheet

Northwoods' approach to pricing solutions is to provide the customer a comprehensive cost budget that includes all hardware, software, services, and support costs required to implement the solution. A comprehensive proposal provides the following benefits to BCSE:

- BCSE will be aware of all project costs, which allows for more accurate budgeting.
- Change orders, which add both time and cost to the overall project implementation, are reduced.
- All project costs are accounted for: there are no "hidden" charges

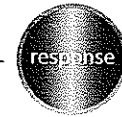


## CSE10015 – Document Imaging and Client Management Systems BID SHEET

Pricing Structure	
Cost of equipment and licenses for the document imaging system: (See Total Detailed Pricing Structure Sheet 1)	\$2,465,172.75
Cost of customization of the document imaging system:	\$0.00
Cost of installation and training for end users for document imaging system:	\$1,802,580.00
Cost of optional one-year maintenance (after conclusion of contract terms):	\$423,177.80
Cost of equipment and licenses for the client management system: (See Total Detailed Pricing Structure Sheet 2)	\$120,196.50
Cost of customization of the client management system:	\$0.00
Cost of installation and training for end users of the client management system:	\$101,595.00
Cost of optional one-year maintenance (after conclusion of contract terms):	\$17,794.00
Cost of technical training for MIS and OT staff:	\$20,000.00
<b>GRAND TOTAL</b>	<b>\$4,950,516.05 *</b>
<b>GRAND TOTAL WITHOUT OPTIONAL ONE-YEAR MAINTENANCE</b>	
	<b>\$4,509,544.25 *</b>

\* - Sales Tax Not Included

Completion of the project within the timeframes outlined in the RFQ is dependent upon a project start date of November 1, 2009. If the project start is delayed by BCSE for any reason the cost of completing the project within the required timeframes may increase due to increased project staffing for implementation. If the project start date is delayed Northwoods reserves the right to submit a change request for additional hours to complete the project within the required timeframes. If the project start is substantially delayed beyond December 31, 2009, it may not be possible to complete the project within the timeframes specified in the RFQ.



CSE10015 – Document Imaging and Client Management Systems  
 BID SHEET – DETAILED PRICING STRUCTURE SHEET “1”

Document Imaging System

County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Kanawha County	107	\$272,496.89	18	\$98,507.00	1 - Dell 4210 Rack with KVM and UPS 1 - Dell PowerEdge 2950 Rack Server 2 - Quad Core Proc, 16GB RAM, 400GB RAID1 MS Win Srv 2003 Ent 5 Year 4 Hour 7x24 Onsite Service 2 - Dell PowerEdge 2950 Rack Server 2 - Quad Core Proc, 16GB RAM 2 - Qlogic 4GB Fibre Channel HBA MS Win Srv 2003 Ent, MS SQL Srv 2005 Ent VMware Infrastructure Enterprise 5 Year 4 Hour 7x24 Onsite Service 1 - Dell AX4-5F SAN with 4.95TB RAID5 5 Year 4 Hour 7x24 Onsite Service 2 - Brocade 300 Fibre Channel Switch 5 Year 4 Hour 7x24 Onsite Service 1 - Dell PowerVault TL2000 LTO4 Tape Drive 25 Pack Tape Media for LTO4 Symantec Backup Exec with VMware Agent 5 Year 4 Hour 7x24 Onsite Service	\$184,190.00	\$562,769.47
SDU Vendor	1	\$4,631.58	1	\$2,944.00			
Ohio County	10	\$30,026.89	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$42,633.89

West Virginia Department of Health & Human Resources,  
Bureau for Child Support Enforcement  
Response to RFQ CSE10015



County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Hancock County	10	\$30,026.89	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$42,633.89
Marshall County	10	\$30,026.89	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$42,633.89
Wetzel County	5	\$19,634.00	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$32,241.00
Tyler County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Wood County	25	\$68,864.55	5	\$13,039.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 1.2TB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$9,379.00	\$91,282.55

West Virginia Department of Health & Human Resources,  
 Bureau for Child Support Enforcement  
 Response to RFQ CSE10015



County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Ritchie County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2 0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Pleasants County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2 0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Wirt County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2 0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Braxton County	13	\$36,262.62	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2 0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$48,869.62
Nicholas County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2 0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12



West Virginia Department of Health & Human Resources,  
Bureau for Child Support Enforcement  
Response to RFQ CSE10015



County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Webster County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Lewis County	14	\$40,894.20	3	\$7,151.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$56,445.20
Gilmer County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Upshur County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Jackson County	11	\$32,105.47	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$44,712.47

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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Mason County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Roane County	4	\$15,002.43	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$26,496.43
Calhoun County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Cabell County	25	\$66,311.55	4	\$10,095.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 1.2TB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$9,379.00	\$85,785.55
Putnam County	8	\$25,869.74	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$38,476.74

West Virginia Department of Health & Human Resources,  
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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Wayne County	7	\$23,791.16	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$36,398.16
Boone County	10	\$30,026.89	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$42,633.89
Lincoln County	7	\$23,791.16	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$36,398.16
Wyoming County	8	\$25,869.74	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$38,476.74
McDowell County	9	\$27,948.31	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$40,555.31

West Virginia Department of Health & Human Resources,  
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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Logan County	10	\$30,026.89	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$42,633.89
Mingo County	11	\$32,105.47	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$44,712.47
Greenbrier County	10	\$30,026.89	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$42,633.89
Mineral County	6	\$21,712.58	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$34,319.58
Pendleton County	3	\$12,923.85	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$24,417.85

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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Grant County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Hampshire County	7	\$23,791.16	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$36,398.16
Hardy County	3	\$12,923.85	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$24,417.85
Randolph County	8	\$25,869.74	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$38,476.74
Tucker County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12



County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Monroe County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Pocahontas County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Fayette County	12	\$34,184.05	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$46,791.05
Mercer County	19	\$51,287.09	3	\$7,151.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$66,838.09
Summers County	1	\$8,766.70	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$20,260.70

West Virginia Department of Health & Human Resources,  
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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Raleigh County	19	\$51,287.09	3	\$7,151.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$66,838.09
Berkeley County	23	\$68,148.40	2	\$4,207.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 1.2TB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$9,379.00	\$81,734.40
Jefferson County	4	\$26,102.43	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$37,596.43
Morgan County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Harrison County	18	\$49,208.51	3	\$7,151.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$64,759.51

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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Doddridge County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Marion County	20	\$64,465.66	3	\$7,151.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 1.2TB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$9,379.00	\$80,995.66
Taylor County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Barbour County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
Monongalia County	14	\$40,894.20	3	\$7,151.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$56,445.20



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County	# of BCSE Employees	Cost of License	# of Scanners	Cost of Scanners	Description of Server/Servers	Cost of Server	Total Cost per County
Preston County	0	\$6,688.12	1	\$3,094.00	Dell PowerEdge T410 Quad Core Server 4GB RAM, 146GB RAID1, 438GB RAID5 Monitor, Keyboard, Mouse MS Win Srv 2003 Std, MS SQL Srv 2005 Std 5 Year 4 Hour 7x24 Onsite Service Buffalo TeraStation III 2.0TB NAS 1.5TB RAID5 UPS	\$8,400.00	\$18,182.12
<b>Total</b>	<b>472</b>	<b>\$1,514,379.75</b>	<b>110</b>	<b>\$325,887.00</b>		<b>\$624,906.00</b>	<b>\$2,465,172.75</b>



CSE10015 – Document Imaging and Client Management Systems  
 BID SHEET – DETAILED PRICING STRUCTURE SHEET “2”

Client Management System

County	# of BCSE Employees	Cost of Licenses	Cost of Kiosk	Cost of Other (cables, etc.)	Cost per County
Marion County	20	\$32,355.32	\$13,518.00	\$0.00	\$45,873.32
Berkeley County	23	\$36,376.12	\$13,518.00	\$0.00	\$49,894.12
Jefferson County	4	\$10,911.06	\$13,518.00	\$0.00	\$24,429.06
<b>Total</b>	<b>47</b>	<b>\$79,642.50</b>	<b>\$40,554.00</b>	<b>\$0.00</b>	<b>\$120,196.50</b>



## Hardware Listing

COMPONENT	QTY	DESCRIPTION /MFG. PART NUMBER
<b>Scan Station Hardware for all County Offices</b>		
Self Check-in/Self Scan Kiosk	3	Self Check-in/Self Scan Kiosk
Fujitsu Scanner	110	FUJITSU FI-6130 CLR DPLX 40PPM/30PPM
Scanning PC	93	Dell OptiPlex 755 Core 2 Duo E4500
Touch Screen	81	ELO 1515L INTELLITOUCH SERIAL/USB
Receipt Printer	81	BROTHER HL-2140 22PPM 8.5X14 USB
Scanning Furniture	53	BALT WORKSTATION TSK ADJ HT BK
Label Printer	53	DYMO WRITER LW400 TURBO
USB Numeric Keypad	29	ADESSO 19-KEY USB NUMERIC KEYPAD
Canon DR-3080 Scanner	12	Canon DR-3080 Scanner
17" Flat Panel Monitors	12	Dell UltraSharp 1708FP
<b>Server Hardware and Software for State Office (Kanawha)</b>		
Server Rack, Monitor, Keyboard, & UPS	1	Dell 4210 Rack with Doors and Side Panels 2 - 3000VA UPS 208 Volt
KVM & Cables	1	8 Port KVM Analog 4 - USB Server Interface Pad with CAT5 Cable
DM Servers	2	PowerEdge 2950 2 - Intel Xeon Quad Core E5430 Processor 16 GB RAM Dual Ranked DIMM ONBOARD BROADCOM 5708 1GB DVD- ROM, SATA, Internal Energy Smart Redundant Power Supply with Dual Cords Power Cord, NEMA 5-15P to C14,15 amp, wall plug, 10'
Fibre Channel Switch	2	Brocade 300 8-16-24 Port FC4 Switch 5 Year 4 Hour 7x24 Onsite Service
SAN	1	Dell AX4-5F DP (Dual Storage Processor) Array 12 - 450Gb 15,000 RPM SAS 3Gbps 3 5-in HotPlug Hard Drive Power Cord Kit, 125V, AX4 US/CAN UPS Standby Power Supply 1000W for AX4 5 Year 4 Hour 7x24 Onsite Service
LTO4 Tape Drive Autoloader	1	PowerVault TL2000 Library LTO4-120, 1 Native



COMPONENT	QTY	DESCRIPTION /MFG. PART NUMBER
		Fibre Drive
		25 Pack Tape Media for LTO4-120 tape 800GB/1.6TB
		5 Year 4 Hour 7x24 Onsite Service
Vmware Controller Server	1	PowerEdge 2950 2 - Intel Xeon Quad Core E5430 Processor 16 GB RAM Dual Ranked DIMM 2 - 400GB 10K RPM SAS 3Gbps 3.5-in HotPlug Hard Drive PERC6i SAS RAID Controller ONBOARD BROADCOM 5708 1GB Optical Drive Cable, SATA PE2950 DVD- ROM, SATA, Internal 1x6 Backplane for 3.5-inch Hard Drives Integrated SAS/SATA RAID 1, PERC 6/i Energy Smart Redundant Power Supply with Dual Cords Power Cord, NEMA 5-15P to C14,15 amp, wall plug, 10' 5 Year 4 Hour 7x24 Onsite Service
VMWare Infrastructure	2	VMWare Infrastructure Enterprise for 2 Processors
Microsoft Windows Server 2003	3	Microsoft Windows Server 2003 Enterprise
Microsoft SQL Server 2005	1	Microsoft SQL Server 2005 Enterprise
Microsoft SQL Server 2005	472	Microsoft SQL Server 2005 CALs
Symantec Backup Exec 12.5	1	Symantec Backup Exec 12.5 with Vmware Agents
RPM 4.5 Select	1	RPM 4.5 Select
<b>Server Hardware and Software for County Offices with 20 Users or More (4 Total)</b>		
DM Servers	4	PowerEdge T410 with 17" Monitor Intel Xeon Quad Core E5520 Processor 4 GB RAM Dual Ranked DIMM 2 - 146GB 15K RPM Serial-Attach SCSI Hard Drive 4 - 300GB 15K RPM Serial-Attach SCSI Hard Drive Redundant Power Supply with Dual Cords Microsoft Windows Server 2003 Standard Microsoft SQL Server 2005 Standard 5 Year 4 Hour 7x24 Onsite Service



COMPONENT	QTY	DESCRIPTION /MFG. PART NUMBER
DM NAS	4	Buffalo TeraStation III 2.0TB
		4 - 500GB 7200RPM Serial ATA Hard Drive
		3 Year Warranty
UPS	4	MS Standard - 1440 VA Dell Smart-UPS by APC
RPM 4.5 Select	4	RPM 4.5 Select
<b>Server Hardware and Software for County Offices less than 20 Users (48 Total)</b>		
DM Servers	48	PowerEdge T410 with 17" Monitor
		Intel Xeon Quad Core E5520 Processor
		4 GB RAM Dual Ranked DIMM
		2 - 146GB 15K RPM Serial-Attach SCSI Hard Drive
		4 - 146GB 15K RPM Serial-Attach SCSI Hard Drive
		Redundant Power Supply with Dual Cords
		Microsoft Windows Server 2003 Standard
		Microsoft SQL Server 2005 Standard
		5 Year 4 Hour 7x24 Onsite Service
DM NAS	48	Buffalo TeraStation III 2.0TB
		4 - 500GB 7200RPM Serial ATA Hard Drive
		3 Year Warranty
UPS	48	MS Standard - 1440 VA Dell Smart-UPS by APC
RPM 4.5 Select	48	RPM 4.5 Select



## **Appendix A – Maintenance and Support**

### **Compass Software Maintenance (Phone/Remote)**

The Compass Software Maintenance Agreement provides for Help Desk support, remote control support and software version upgrades. Phone/remote maintenance and support services generally will be available during the hours of 8:00 a.m. to 8:00 p.m. Eastern Time, Monday through Friday, excluding holidays, in the normal course of its business, by on-line remote control, telephone or both.

#### ***Northwoods Support Center***

The Northwoods Support Center is our customer's first line of support for all system related support issues. All calls for support are made to the Northwoods corporate offices where they are routed to the appropriate technical support engineer. The Northwoods Support Center (NSC) is located at our corporate office in Dublin, Ohio. The staff at the center can be reached by calling 614-545-0999, by email at [help@teamnorthwoods.com](mailto:help@teamnorthwoods.com) or via the web at [www.teamnorthwoods.com](http://www.teamnorthwoods.com).

#### ***Remote Control Support***

If necessary, our support staff asks permission to enter the customer's system through a remote control connection, including connectivity to the desktops via an industry standard tool. Once a connection is made, the technical support engineer can identify the issue and either instruct the user to make the changes or if given permission can make the changes remotely.

The Remote Control Support services assume that we have been granted permission to enter the customer's system and that we have the appropriate physical connection established.

#### ***Compass Software Version Upgrades***

Each of Northwoods Compass Software products is constantly enhanced via a regimented Product Change Request (PCR) process. PCR's are submitted by both our user base and support personnel and are extensively reviewed by our Product Management team for consideration. Each PCR is assigned a priority and processed through our Development and Quality Assurance teams. As new product versions pass our QA testing, they are released to a diverse community of beta users. These users exercise the software for a period of time, reporting any anomalies directly to their assigned project manager. After completion of the beta testing period, the product release is made available to our Integration Services Team for deployment to our population of users currently covered under maintenance.

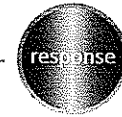


All major Compass Software product releases will be provided to DHHR/BCSE by Northwoods as they are released. Minor upgrades and enhancements will be provided to the DHHR/BCSE by Northwoods when it is determined that the upgrade or enhancement will directly impact the performance of the customer's system as determined by Northwoods at its sole discretion.

Custom enhancements to the software requested by a customer that are not considered to be part of the PCR process are available on a time and materials or fixed cost basis. Northwoods will provide a cost estimate upon request.

## **Northwoods OnSite Maintenance Services**

When a support issue cannot be resolved by phone or remote control or when a customer simply prefers the convenience of being able to turn over complete issue resolution to our staff, Northwoods staff is available to travel to the agency. OnSite Maintenance and Support Services generally will be available during the hours of 8:00 a.m. to 5:00 p.m. in the time zone where the system is installed, Monday through Friday, excluding Northwoods standard holidays.



## Appendix B – Required Forms





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ATTACHMENT  
P O # CSE10015

This agreement constitutes the entire agreement between the parties, and there are no other terms and conditions applicable to the licenses granted hereunder

Agreed  
  
Signature                      Date 9-8-09

President  
Title

Northwoods Consulting Partners, Inc.  
Company Name

\_\_\_\_\_  
Signature                      Date

\_\_\_\_\_  
Title

\_\_\_\_\_  
Agency/Division

**AGREEMENT ADDENDUM**

WV-96  
Rev 10/07

In the event of conflict between this addendum and the agreement, this addendum shall control:

- 1 **DISPUTES** - Any references in the agreement to arbitration or to the jurisdiction of any court are hereby deleted. Disputes arising out of the agreement shall be presented to the West Virginia Court of Claims
- 2 **HOLD HARMLESS** - Any clause requiring the Agency to indemnify or hold harmless any party is hereby deleted in its entirety
- 3 **GOVERNING LAW** - The agreement shall be governed by the laws of the State of West Virginia. This provision replaces any references to any other State's governing law
- 4 **TAXES** - Provisions in the agreement requiring the Agency to pay taxes are deleted. As a State entity, the Agency is exempt from Federal, State, and local taxes and will not pay taxes for any Vendor including individuals, nor will the Agency file any tax returns or reports on behalf of Vendor or any other party
- 5 **PAYMENT** - Any references to prepayment are deleted. Payment will be in arrears
- 6 **INTEREST** - Should the agreement include a provision for interest on late payments, the Agency agrees to pay the maximum legal rate under West Virginia law. All other references to interest or late charges are deleted
- 7 **RECOURPMENT** - Any language in the agreement waiving the Agency's right to set-off, counterclaim, recoupment, or other defense is hereby deleted.
- 8 **FISCAL YEAR FUNDING** - Service performed under the agreement may be continued in succeeding fiscal years for the term of the agreement, contingent upon funds being appropriated by the Legislature or otherwise being available for this service. In the event funds are not appropriated or otherwise available for this service, the agreement shall terminate without penalty on June 30. After that date, the agreement becomes of no effect and is null and void. However, the Agency agrees to use its best efforts to have the amounts contemplated under the agreement included in its budget. Non-appropriation or non-funding shall not be considered an event of default
- 9 **STATUTE OF LIMITATION** - Any clauses limiting the time in which the Agency may bring suit against the Vendor, lessor, individual, or any other party are deleted.
- 10 **SIMILAR SERVICES** - Any provisions limiting the Agency's right to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are hereby deleted
- 11 **ATTORNEY FEES** - The Agency recognizes an obligation to pay attorney's fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void
- 12 **ASSIGNMENT** - Notwithstanding any clause to the contrary, the Agency reserves the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the Vendor and Vendor shall obtain the written consent of Agency prior to assigning the agreement
- 13 **LIMITATION OF LIABILITY** - The Agency, as a State entity, cannot agree to assume the potential liability of a Vendor. Accordingly, any provision limiting the Vendor's liability for direct damages to a certain dollar amount or to the amount of the agreement is hereby deleted. Limitations on special, incidental or consequential damages are acceptable. In addition, any limitation is null and void to the extent that it precludes any action for injury to persons or for damages to personal property
- 14 **RIGHT TO TERMINATE** - Agency shall have the right to terminate the agreement upon thirty (30) days written notice to Vendor. Agency agrees to pay Vendor for services rendered or goods received prior to the effective date of termination
- 15 **TERMINATION CHARGES** - Any provision requiring the Agency to pay a fixed amount or liquidated damages upon termination of the agreement is hereby deleted. The Agency may only agree to reimburse a Vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by the Agency prior to the end of any current agreement term
- 16 **RENEWAL** - Any reference to automatic renewal is hereby deleted. The agreement may be renewed only upon mutual written agreement of the parties.
- 17 **INSURANCE** - Any provision requiring the Agency to insure equipment or property of any kind and name the Vendor as beneficiary or as an additional insured is hereby deleted
- 18 **RIGHT TO NOTICE** - Any provision for repossession of equipment without notice is hereby deleted. However, the Agency does recognize a right of repossession with notice
- 19 **ACCELERATION** - Any reference to acceleration of payments in the event of default or non-funding is hereby deleted
- 20 **CONFIDENTIALITY** - Any provision regarding confidentiality of the terms and conditions of the agreement is hereby deleted. State contracts are public records under the West Virginia Freedom of Information Act
- 21 **AMENDMENTS** - All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by both parties. No amendment, modification, alteration or change may be made to this addendum without the express written approval of the Purchasing Division and the Attorney General.

ACCEPTED BY:  
**STATE OF WEST VIRGINIA**

Spending Unit: \_\_\_\_\_  
Signed: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

**VENDOR**

Company Name: Northwoods Consulting Partners, Inc.  
Signed: [Signature]  
Title: President  
Date: 9-8-09

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

**VENDOR OWING A DEBT TO THE STATE:**

*West Virginia Code* §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate

**PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:**

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code*. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code* and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the *West Virginia Code* may take place before their work on the public improvement is begun

**ANTITRUST:**

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will 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 the bidder

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid

**LICENSING:**

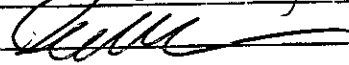
Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

**CONFIDENTIALITY:**

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated

Vendor's Name: Northwoods Consulting Partners, Inc.

Authorized Signature:  Date: 9-8-09

# State of West Virginia VENDOR PREFERENCE CERTIFICATE

Certification and application\* is hereby made for Preference in accordance with **West Virginia Code, §5A-3-37** (Does not apply to construction contracts). **West Virginia Code, §5A-3-37**, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

- 1. N/A **Application is made for 2.5% resident vendor preference for the reason checked:**  
Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,  
N/A Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or,  
N/A Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; or,
- 2. N/A **Application is made for 2.5% resident vendor preference for the reason checked:**  
Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,
- 3. N/A **Application is made for 2.5% resident vendor preference for the reason checked:**  
Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; or,
- 4. N/A **Application is made for 5% resident vendor preference for the reason checked:**  
Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; or,
- 5. N/A **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**  
Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; or,
- 6. N/A **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**  
Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: Northwoods Consulting Partners, Inc Signed: Gary Henze / Ac  
Date: 9-8-09 Title: President

\*Check any combination of preference consideration(s) indicated above, which you are entitled to receive