



# Document Management Imaging System

For:

## The West Virginia State Tax Division

RFQ # TAX12008

Due: June 27, 2012 at 1:30 PM

Submitted by:



Visual Data Software Corporation  
1035 N. 3<sup>rd</sup> St., Suite 102  
Lawrence, KS 66044  
785-727-1580

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WV PUBLIC SAFETY  
DIVISION



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## Letter of Introduction



1035 N. 3<sup>rd</sup> St., Suite 102

Lawrence, KS 66044

Phone: 785.727.1580

Fax: 800-207-0378

June 27, 2012

Connie Hill  
Department of Administration  
Purchasing Division  
2019 Washington Street, East  
Charleston, WV 25311

### RE: Document Management Imaging System

Please find enclosed one signed original of the Visual Data Software Corporation (VDS) proposal in response to the above referenced RFQ.

VDS is pleased to submit this proposal to the West Virginia State Tax Division. Our successful past imaging and document management projects and hosted and on-premise implementations of our Enterprise Document Management System (DocWarehouse®) uniquely positions VDS to succeed in the implementation of our application for the West Virginia State Tax Division. We are able to and willing to meet (or exceed) the requirements as stated in the Request for Proposal and to beat the pricing offered by any of our competitors for the same features and services.

VDS has the ability to adeptly respond to its customers' needs by understanding the customer's requirements and configuring the DocWarehouse® product suite to meet or exceed customer expectations. Our systems will help you support your objectives while satisfying time and budgetary constraints. VDS will leverage technology made available by our EDMS solution and utilize an experienced, world-class management team to design, implement, and oversee delivery of your project by implementing a reliable, scalable, and cost-effective solution.

Based on this request for proposal, I am confident that the State of West Virginia will be pleased to see that our solution not only meets your requirements for today, but that we also meet your expected requirements in the future. VDS has solutions and add-ons that may be of interest like e-commerce enabled DocWarehouse® Kiosks, applications for mobile devices, integrated Automated Voice Response systems for inbound and outbound calling in multiple languages, issue tracking, asset management (digital and physical), and so much more. Furthermore, we will show that we can save the State a significant amount of money in licensing fees and integration costs that the State of West Virginia may be expecting to pay for integrations with forms processing software, fax server software, document management software, issue tracking software, etc. Our solution is, as you will see, a supremely comprehensive solution that does it all,

eliminating the need for such integrations, but allows the flexibility to do them should you choose to. You won't find any other EDMS that offers the kinds of functionality that DocWarehouse® does.

Visual Data Software Corporation is a United States Veteran owned enterprise (VBE). We are an equal opportunity employer, and as president, I can affirm that I am legally authorized to bind VDS to any contract.

Warm Regards,



Keith Mason, President  
1035 N. 3<sup>rd</sup> St., Suite 102  
Lawrence, KS 66044  
Phone: (785) 727-1580  
E-mail: kmason@visualdatasoft.com





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  
 TAX12008

PAGE  
 2

ADDRESS CORRESPONDENCE TO ATTENTION OF  
 CONNIE HILL  
 304-558-2157

RFQ COPY  
 TYPE NAME/ADDRESS HERE  
 Visual Data Software Corporation  
 1035 N. 3<sup>rd</sup> St. Suite 102  
 Lawrence, KS 66044

STATE TAX DIVISION  
 INFORMATION TECHNOLOGY DIV  
 1206 QUARRIER STREET  
 CHARLESTON, WV  
 25301-1725 304-558-8850

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
05/30/2012				

BID OPENING DATE: 06/27/2012 BID OPENING TIME

LINE	QUANTITY	UOP	CAT NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
SEE ATTACHED SPECIFICATIONS  INQUIRIES: WRITTEN QUESTIONS SHALL BE ACCEPTED THROUGH CLOSE OF BUSINESS ON 06/12/2012. 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:  CONNIE HILL DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25311  FAX: (304) 558-4115 E-MAIL: CONNIE.S.HILL@WV.GOV  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.  OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY 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.)						

BANKRUPTCY: IN THE EVENT OF BANKRUPTCY, THE CONTRACTOR FILES

SIGNATURE	TELEPHONE	DATE
	(785) 727-1580	6-19-12
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
President	77-0661108	

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

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 Lawrence, KS 66044

VENDOR

STATE TAX DIVISION

INFORMATION TECHNOLOGY DIV

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BID OPENING DATE: 06/27/2012 BID OPENING TIME

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>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> <p>REV. 01/17/2012</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 SPECIFICATIONS IN ACCORDANCE WITH SECTION 148-1-4(F) OF THE WEST VIRGINIA LEGISLATIVE RULES AND REGULATIONS.</p> <p>NOTICE</p> <p>A SIGNED BID MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION          PURCHASING DIVISION          BUILDING 15          2019 WASHINGTON STREET, EAST          CHARLESTON, WV 25305-0130</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE 	TELEPHONE (785) 727-1580	DATE 6-19-12
TITLE President	FEIN 77-0661108	ADDRESS CHANGES TO BE NOTED ABOVE

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 Purchasing Division  
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LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<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> <p>BUYER: CONNIE HILL/51</p> <p>RFQ. NO.: TAX12008</p> <p>BID OPENING DATE: JUNE 27, 2012</p> <p>BID OPENING TIME: 1:30 PM</p> <p>PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID:            (800) 207-0378</p> <p>CONTACT PERSON (PLEASE PRINT CLEARLY):            Keith Mason</p> <p>ANY INDIVIDUAL SIGNING THIS BID IS CERTIFYING THAT:            (1) HE OR SHE IS AUTHORIZED BY THE BIDDER TO EXECUTE THE BID OR ANY DOCUMENTS RELATED THERETO ON BEHALF OF THE BIDDER, (2) THAT HE OR SHE IS AUTHORIZED TO BIND THE BIDDER IN A CONTRACTUAL RELATIONSHIP, AND (3) THAT THE BIDDER HAS PROPERLY REGISTERED WITH ANY STATE AGENCIES THAT MAY REQUIRE REGISTRATION.</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE TELEPHONE (785) 727-1580 DATE 6-19-12

TITLE President FEIN 77-0661108 ADDRESS CHANGES TO BE NOTED ABOVE

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

## Executive Summary

Our software customers rely on our flagship product suite, Visual DocWarehouse® to process millions and millions of documents each year. We are confident that an implementation of DocWarehouse® is the best solution for the West Virginia State Tax Division Document Management Imaging System needs because it not only provides you with all of the desired functionality described in this RFQ, but our product's capabilities are extensive and will help you grow over the years. As a high level overview, this is what it has to offer:

- Public, Customer Configurable Web Portal
- High volume scanning
- Barcode Recognition (1-D and 2-D)
- Dynamic Records Management Capabilities
- Image Despeckle/Deskew, Blank page recognition
- Image rotation, Annotation, redaction
- Robust API for integrating external systems
- Optical Marksense Recognition (OMR)
- Optical Character Recognition (OCR)
- Multi-Organization support
- Batch / Page Integrity Checking to ensure record / page accountability after scanning
- Business Rules Processing
- Robust Workflow Engine
- Manual Data Capture using Key From Image (KFI) / Key From Snippet (KFS)
- Document Printing, Correspondence Letter Printing
- Web Based Call Center Interface
- Web Based Customer Portal
- Interactive Voice Response (IVR) system integration
- Web based reporting
- Email integration for system notifications and reporting
- Multi-Language support
- E-Forms support, Digital Signature support
- Powerful repository searching of over 200 popular document types

The solution we are proposing uses the DocWarehouse® public and private web portals and web service APIs hosted on the State of West Virginia servers to satisfy the requirements of this RFQ.

Our proposed solution utilizes the Visual DocWarehouse® product suite to facilitate the records and document management features required to successfully allow the West Virginia State Tax Division to manage investigations from cradle to grave with external interfaces to other agency's systems.

Document types and case types (record types) are configured with in the system for each type that may be utilized within the agency. DocWarehouse® allows for unlimited case (record) and document types to be created. Characteristics about each type can be configured as per the requirements indicated in the RFQ and the requirements documented in the Discovery Phase of this project. Each type can have an unlimited number of data fields associated with it.

Visual DocWarehouse® is a primarily web based solution (for user interfaces) that would allow for data capture at any machine that has access to your intranet after a secure login/authentication process. If desired, investigation related records and documents can also be submitted via the public web portal or via fax or email. Visual DocWarehouse® also affords the ability for all documents tagged for private or public viewing.

On the back end, Visual DocWarehouse® utilizes a robust SQL Server 2008 database engine for data storage and encryption, workflow rules, and calculations. SQL Server reporting services are integrated within our product to allow the customer to manipulate report data on an ad-hoc basis. Standard reports are also available and all reporting is available via the web interface as a PDF or via email as an attachment and can be scheduled for periodic execution.

On the application server, Visual DocWarehouse® has a host of over 60 Windows™ services that allow for the configuration of any possible implementation.

The Software is 100% managed code written in C#.Net from the ground up. We have built in "TouchPoints" that we feel are frequently changed pieces to any solution that allow us (or our customers) to modify logic specific to their implementation without the need to change the core product. Based on the requirements for this project, we expect at a minimum the following touchpoints to be modified: Import, Export, Business Rules, SysWatcher. VDS will have the ability to implement any of the touchpoints necessary for the West Virginia State Tax Division once the requirements have been established. All TouchPoint code will be the property of the West Virginia State Tax Division per the RFQ.

## Company History

**Microsoft®**  
**GOLD CERTIFIED**

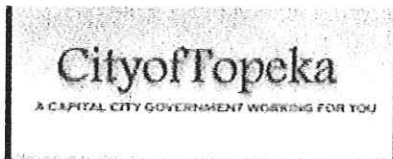
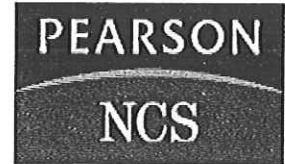
*Partner*

Since its inception in January, 2006, Visual Data Software Corporation has been a provider of World Class Enterprise Content Management (ECM) solutions. We are a Delaware corporation headquartered in Lawrence, Kansas. Formerly, we were Visual Data Technologies (since 1999), providing our customers with custom developed website and integrated ECM solutions. We are a Microsoft Gold Certified Partner, and our staff is composed of highly qualified Microsoft Certified developers that have extensive website development and enterprise content management experience.

We have developed solutions for many companies over the years. To name a few:

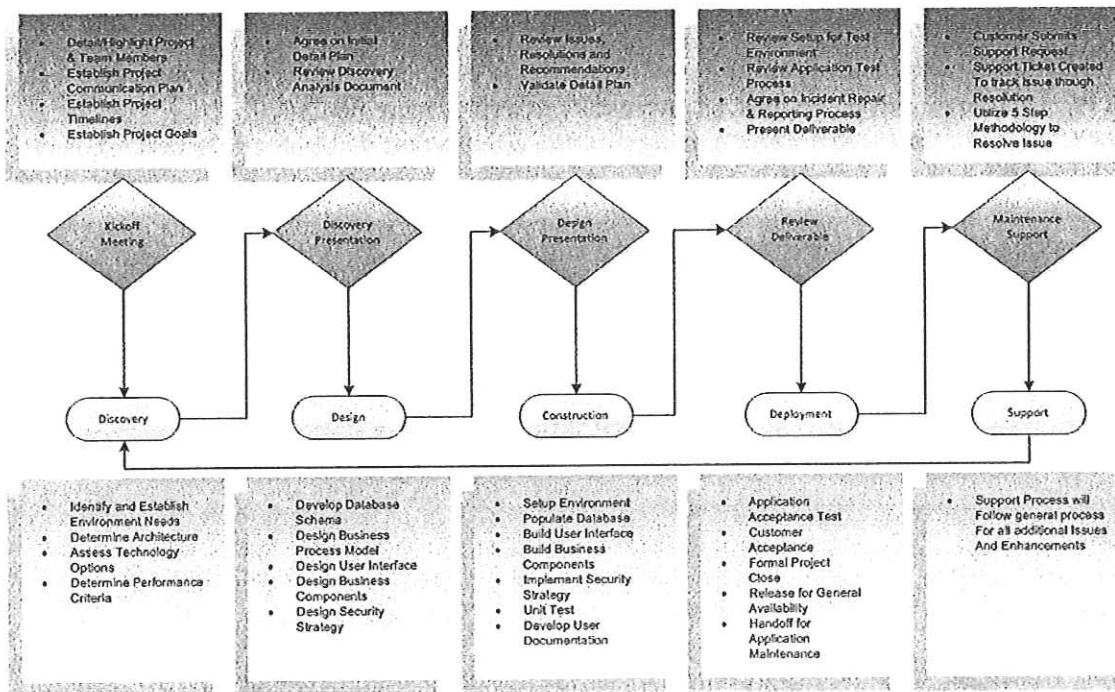
- NASA
- Department of Defense
- Department of Labor
- Social Security Administration
- Pension and Welfare Benefits Administration
- Internal Revenue Service
- Veterans Health Administration
- Her Majesty's Land Registry
- Ford Motor Company
- State of California
- State of Texas
- Johns Hopkins University
- Ciena Corporation
- Intersect Software
- Pearson Government Solutions
- U.S. Senate
- U.S. House of Representatives
- State of Utah
- Church Street Health Management





## Methodology

The members of our project development team will work hard to assure that *all* stakeholders in the project - including management, users and technical staff -- gain a complete understanding of the technology and its underlying principles. In addition, our application architectures and development environments allow for rapid refinement and upgrade. So VDS delivers the application you need, *and* the power to make it even better -- because we'll make sure you have the skills, the tools, and the understanding to refine your application in response to changing markets and technologies.



## Summary of Project Phases

- **Discovery**

VDS begins the process of understanding the client organization, its industry, and its information requirements with an Assessment, which typically consists of a visit to the client site and follow-up report.

During the Assessment, VDS defines the scope of the project by identifying the business and technical requirements. In addition, the business case is outlined, stakeholder groups are identified and the project is planned in terms of tasks, effort and duration.

- **Design**

VDS Design process includes several key tasks:

- Establish **Prototype Tools and Guidelines** for the user interface and code.
- Assess the current technology **infrastructure** and develop a plan for revisions based on current status and anticipated needs.
- Develop a complete **prototype** with a working model.
- Establish the development environment **tools and guidelines**, and develop a complete, representative slice of the application.

- Create **Test Plans** for all software modules, database failure and recovery procedures, and software integration.

Transition from Design to Constructions at the end of Visualization is marked by presentation of the design documents and updated Project Plan, and official acceptance by the stakeholders.

- **Construction**

Several concurrent activities occur during Construction:

- Instantiation is completed, allowing a working model to be built. Breaking the process into Instantiation and Propagation provides the flexibility necessary to deploy incrementally.
- **Data Transformation Analysis and Implementation** is important for applications that rely on incorporating existing and outside sources of data.
- **Transition Planning** includes scheduling system rollout, ensuring hardware and software will be in place, and finalizing user and administrator training plans.
- **Testing** occurs on several levels as the application development progresses. Developers check their individual work, the Quality Assurance team develops and executes test suites against integrated modules, and stakeholders review the application for completeness, accuracy, and ease of use.
- Writing the **User and Administration Documentation** begins in this stage.

Acceptance of the Construction deliverables marks the transition to Deployment.

- **Deployment**

The length and structure of Deployment varies significantly from project to project, depending on the application architecture and the landscape of the production environment.

- During **Transition**, VDS and the Stakeholders perform final integration testing, and VDS provides training for end-users and application administrators.
- For applications with legacy data, **Cut-Over** begins with the execution of a carefully rehearsed data conversion process. To ensure continuous business operations throughout the data conversion process, contingency plans are created in advance, and ready to deploy if necessary.

**Maintenance** concludes the Deployment stage, beginning as the tested application is installed in the production environment.

- **Support**

The ongoing maintenance support process follows the following:

- The Customer submits a support request
- A support ticket is created in VDS' support web site's issue tracking system which is used to track an issue through to its resolution.
- In addition to patch releases, VDS updates the DocWarehouse® product suite with quarterly releases that are backwards compatible and do NOT effect customer data or dynamic web pages.

The standard process is followed for additional issues and enhancements.



## References

While we are providing only four references below, it is important to note that we have provided similar solutions to the one being requested to: Georgia Department of Revenue, Internal Revenue Service, Social Security Administration, Pension and Welfare Benefits Administration, Department of Labor, Veterans Health Administration, NCS/Pearson, Logicon, NASA, and several others. These implementations, however, occurred between 1999 and 2005 and used what was considered the best technologies available at the time. This always included the integration of systems like Captiva's Formware product for data capture with Action Point's Input Accel product for imaging and workflow as well as some type of back end like Vitira or Siebel. It is because those implementations used integrations of systems that were not able to provide an end to end solution all by themselves that we developed the Visual DocWarehouse® product suite and switched to a software vendor from a consulting company in 2005/2006. Now our customers can enjoy the benefits of a lower cost implementation, single point of support, and a truly seamless implementation that just works better.

Below is a list of 4 references that use our new product suite. They have each given us permission to use them as a reference for this proposal and are expecting your calls or emails.

**Organization:** Utah Public Service Commission

**Address:** 160 E. 300 So.  
Salt Lake City, UT 84111

**Contract Value:** About \$178,500 License and 2 years of support

**Contact:** Sheri Bintz

**Email Address:** [sbintz@Utah.gov](mailto:sbintz@Utah.gov)

**Phone Number:** 801-530-6714

**Contract Beginning Date:** 06/15/2009

**Contract #:** 096425



**Project:** The State of Utah's Public Service Commission, Office of Consumer Services and Division of Public Utilities share a single DocWarehouse® license to facilitate the capture of paper and electronic documents and implement associated workflows with various document types that often span all three organizations. Case specific documents can be published for the public to see while other documents remain securely internal. Integration with the Utah Public Service Commission website for case document searching and retrieval as well as public calendar items was required.

**Organization:** Solix, Inc for the State of California Public Utilities Commission

**Address:** 30 Lanidex Plaza West  
P.O. Box 685  
Parsippany, NJ 07054

**Contract Value:** About \$800,000 to date including both unlimited user licenses purchased by Solix, annual support, and enhancements.

**Contact:** Jack Donovan

**Email Address:** [jdovona@solixinc.com](mailto:jdovona@solixinc.com)

**Phone Number:** 973-581-5220

**Contract Beginning Date:** 1/1/2006

**Project:** California LifeLine, - Since 2006, about 5 million documents per year get created, filled out scanned in, barcodes read, optical mark sense processed, PDFs created, business rules processed, letters generated, emails sent, outbound phone calls made, and document reviewers are able to process documents in record times. The documents go out in 7 languages. The servers are hosted in New Jersey with 1300 call center reps using the system for English and Spanish in Texas, 30 call center reps are using the system in California for Asian languages, the California Public Utilities Commission uses the system daily as does up to 40 telephone carriers, a Braille printing company, and the API is used by a company in Oregon for IVR integration. Between 30,000 and 90,000 phone calls get placed daily through this system in 7 languages to let California applicants know that a form was mailed to them or has not been received in a timely manner

Other projects have been implemented for Solix as well: Texas DEAR for organ donor registry document imaging and processing as well as Texas STAP for voucher processing.

 **TEXAS**  
Department of State Health Services



**Organization:** HOV Services for the Orange County, CA District Attorney's Office

**Contact:** Carlos Briceno

**Email Address:** [Carlos.Briceno@hovservices.com](mailto:Carlos.Briceno@hovservices.com)

**Phone Number:** 760-956-4979

**Contract Amount:** \$84,000 to date (License and 2 years of support)



**Project:** This implementation for the OCDA uses DocWarehouse® for web based document management integrated with the existing Case management system used by the District Attorney's office through the DocWarehouse® API. This implementation was awarded to us with our strategic partner (HOV Services) who is doing the scanning of the 15 million historical criminal case files that are to be imported into DocWarehouse®. The OCDA chose our solution over proposed solutions using EMC's Documentum and IBM's FileNet because of the cost, functionality, robust API, ability to scale the solution as they become ready for it, and the technology used to implement the solution. This project is currently installed in a new production environment and scanning production documents has just been approved.

**Organization:** Towne, Allpoints Communications

**Address:** 3441 West MacArthur Blvd.  
Santa Ana, CA 92704

**Contract Value:** About \$400,000 to date including the unlimited user licenses, annual support, and enhancements.

**Contact:** Debora Griffith

**Email Address:** [debora.griffith@towne.com](mailto:debora.griffith@towne.com)

**Phone Number:** 714-540-3095




**Project:** Corporate Document Management and Digital Asset Management – This implementation is a full scale large company implementation of DocWarehouse® for document Imaging and Document management as well as Digital Asset Management. It allows Towne to process (scan, capture data, read barcodes, optical mark sense processing, annotations, redactions, based on security profiles) all of their internal HR documents, Internal and External Accounting documents. It also lets them process external print requests from their customers, send emails, place outbound calls, handle inbound calls, and also handle inbound and outbound IVR tasks.

## Mandatory Requirements

#	Requirement	Meet Spec's	Does not meet
	<b>Scanning / Indexing</b>		
A1	Documents must be able to be scanned into the document management system from any standard scanner without specialized hardware	✓	
A2	System must allow for multiple TWAIN scan stations without requiring additional software. Scanning can be performed through a web browser	✓	
A3	System must be able to accommodate high volume scanning and indexing	✓	
A4	Must be able to input (scan) documents directly from a multi function display control panel into the DMIS system	✓	
A5	The DMIS must have the ability to convert existing static forms in to electronic forms that can be filled out locally as well as e-mailed. The completed electronic form must then have the ability to transfer the data automatically into the DMIS	✓	
A6	After locating documents, user may open, save, e-mail, fax, edit, check out, or delete them based on administrator defined privileges, all from a web browser	✓	
A7	The Ability to retrieve data from existing software packages on screen, and incorporate it directly into the DMIS by end users	✓	
A8	Scanning into the Document Management system must be available from multiple physical locations	✓	
A9	System must be able to index on a variety of customizable attributes and search for/retrieve them by these attributes	✓	
A10	System must be able to index and search by custom fields, must be able to perform Full Text Searching, Boolean searching, Proximity Searching, Field-Based/Metadata Searching, Date-Range & Wildcard Searching, Folder-Level Browsing	✓	
A11	System must allow modifications to the document index/metadata	✓	
A12	System must be able to retrieve documents based on partial search criteria	✓	
A13	System must be intuitive and easy to use requiring limited to no special training	✓	
A14	System must not require special indexing or cover sheets for scanning documents	✓	

A15	System must allow for two-sided scanning	✓	
A16	System must be able to allow deletion of a document and replacement with another	✓	
A17	System must allow documents to be referenced by a user entered name	✓	
A18	System must provide the capability to annotate and/or add comments to a document	✓	
A19	System must support color scanning	✓	
<b>Workflow</b>			
B1	System must include an online workflow for document routing, approval and subsequent storage	✓	
B2	System must provide message templates for E-mails	✓	
B3	System must have a report function capable of showing the volume of correspondence received to each user group, time between responses, and correspondence that has not been answered	✓	
<b>Forms Management Option</b>			
C1	System must have capability to create custom forms	✓	
C2	System must be capable of prefiling online PDF-Forms with relevant data from databases	✓	
C3	System must be capable of taking data from user input into online, PDF forms	✓	
C4	System must be capable of routing completed online, PDF forms through a workflow tool for review and approvals	✓	
<b>Security</b>			
D1	System must be SSL Compatible	✓	
D2	System must have Document Permissions (View, Edit, Add, Delete, etc.)	✓	
D3	System must provide admin rights to set each group's permissions	✓	
D4	System must have ability to configure Session Timeouts	✓	
<b>Technical</b>			
E1	System must operate in a Windows Server (2003/2008) environment	✓	
E2	System must use MS SQL Server as its database	✓	
E3	Must be able to convert data in a timely manner. This conversion must be a proven ability	✓	
<b>Support</b>			
F1	Vendor must provide next business day support for troubleshooting and repair	✓	

F2	Devices must have the capability to auto-alert vendor with error codes/faults	✓	
F3	Vendor must provide 24/7/365 USA support center	✓	
F4	Vendor must provide Contextual Help Documentation	✓	
F5	Vendor must provide Live-Chat Support	✓	
F6	Vendor must provide training for users	✓	
Vendor MEETS all Spec's		YES	NO
		✓	
<b>Date</b>	<b>Vendor's Name &amp; Signature</b>	<b>Email Address</b>	<b>Phone # &amp; Fax #</b>
6-19-12	Keith Mason 	kmason@visualdatasoft.com	Phone: (785) 727-1580  Fax: (800) 207-0378

**Pricing**

**Cost Sheet for TAX12008**

Pricing Structure			
Qty.	Description	Unit Cost	Total Cost
50 users (20 concurrent)	Cost of licenses for the document management imaging system	\$995.00 per user	\$49,750.00
Lump sum	Cost of Customization of the document management imaging system	lump sum	\$0.00
10	Cost of installation and training for end users	\$249.00 per user (On-Site Training, 2 days for unlimited users... this is a fixed price)	\$2,490.00
<b>Grand Total</b>			<b>\$52,240.00</b>

**ADDITIONAL OPTIONAL ITEMS – But not counted in bid amount**

Qty.	Description	Unit Cost	Total Cost
1 year	Cost of one-year maintenance after the first year expires – optional (not to be included in bidding award)	\$9,950.00	\$9,950.00
5 each	Cost of additional licenses in bundles of five (5) – optional (not to be included in bidding award)	\$895.00	\$4,475

## Product Information

This section shows several screen shots from the DocWarehouse® product suite as configured for various clients. While many of these screens may be used for your implementation, they can all be modified as desired. Most of the case based implementations that we have done are on-site implementations that we are unable to show you in this proposal. We would, however, be able to set up a demonstration system that would be more tailored to your specific needs if requested.

Note: This is an UNLIMITED User License, and includes ALL DocWarehouse® expansion modules at no addition cost:

- DocWarehouse® Web Application and all document management features.
- DocWarehouse® Scan desktop application
- DocWarehouse® Quick Search desktop application
- DocWarehouse® SysTray desktop application
- DocWarehouse® MS Office Add-Ins
- DocWarehouse® Windows Services Suite (Over 70 services available including OCR, Barcode recognition, Business Rules, Workflow, Import, Export, Encryption, FTP, Image Enhancement, PDF Creation, and many more)
- DocWarehouse® Web Services API – Extend the features of the product suite as desired over time.
- DocWarehouse® Reporting Module using SQL Server Reporting Services, create and customize your own reports
- DocWarehouse® Alerts and Notifications Module – Setup HTML Templates for emailed alerts and notifications, save searches, schedule saved searches for recurring execution and email results.
- DocWarehouse® Calendar module which allows for private calendars, department calendars, organization calendars, and public calendars.
- DocWarehouse® Time and Attendance Module with web and mobile app Time and Attendance tracking and reporting, leave requests and leave calendar.
- DocWarehouse® Annotation module, allows for web based annotations of documents including digital signatures
- DocWarehouse® Travel module, allows for submission of travel requests, travel approval workflows, creation of travel documents, returning trip reporting and multi-traveler trip reporting workflows, and travel calendar.
- DocWarehouse® Issue Tracking module, allows for the cradle to grave management of issues including issue submission, classification, prioritization, tracking, time tracking against issues, file uploads, and reporting.
- DocWarehouse® Contract and License Management module, which tracks your scanned contracts and entered licenses, and provides email alerts when contracts are expiring or licenses are coming up for renewal with date ranged reporting.
- DocWarehouse® Case Management module, allows you to track cases from cradle to grave, including case level index data, multiple hierarchically related documents, schedules calendar



events, notification history, and subscription management. Also includes publishing capabilities to allow case documents to be published for external viewing with or without encryption.

- DocWarehouse® Asset Management module, track digital and physical assets with Library like functionality for check out / in of physical assets with condition reporting and asset location tracking.
- DocWarehouse® Mobile Applications, which provides you with the ability to use DocWarehouse® on your iPhone, iPad, Android Phone, Android Tablet, and Blackberry Phone.

## My Desktop

DocWarehouse - Customer Portal

Documents

- Documents
- My Documents
- Document Review
- Document Searching
- Create Batch Header

Documents

Archive

Reports

Settings

My Desktop

Save Select Widgets

My Checked Out Documents

Document	Checked Out
No records to display.	

Open Responses

Request	Received Date	Assigned To
2012-7-15	3/10/2012	Kath Mason
2012-7-15	3/13/2012	Bilary Johnson

My Alerts

Days to display: 1

Alert	Date
No records to display.	

My Recent Documents

Document ID	Document	Activity
No records to display.		

Open Requests

Request	Requested Date	Requested By
2012-7-14	3/12/2012	Diana Johnson
2012-7-21	3/13/2012	Brad Trebbcock

My Requests

Type	Details	Submitted
No records to display.		

My Favorites

Document ID	Name	Document Type
No records to display.		

My Tasks

Task	Due	Assigned	Document
No records to display.			

My Events

Appointment	Appointment Date	Start
Personal Line 01	06/07/2012	12:30P
Personal Line 01	07/06/2012	12:30P

Department Documents

Document ID	Document
No records to display.	

## Queues

DocWarehouse - Customer Portal

Document Type	Queue	UnAssigned	Assigned
	Doc Splitter Service	1	0
	Email Service Out	72	0
Affidavit/Court Document	Business Rule Service	8	0
Affidavit/Court Document	Doc Review	0	1
Affidavit/Court Document	OCR Service	1	0
Affidavit/Court Document	PDF Service	1	0
Report: Miscellaneous Report	Business Rule Service	8	0
Report: Miscellaneous Report	OCR Service	2	1
Report: Miscellaneous Report	PDF Service	1	0
Report: Miscellaneous Report	Rescan Review	1	0
Transcript	Business Rule Service	8	0
Transcript	OCR Service	6	0

Document Type	Queue	UnAssigned	Assigned
	Doc Splitter Service	1	0
	Email Service Out	72	0
Affidavit/Court Document	Business Rule Service	8	0
Affidavit/Court Document	Doc Review	0	1
Affidavit/Court Document	OCR Service	1	0
Affidavit/Court Document	PDF Service	1	0
Report: Miscellaneous Report	Business Rule Service	8	0
Report: Miscellaneous Report	OCR Service	2	1
Report: Miscellaneous Report	PDF Service	1	0
Report: Miscellaneous Report	Rescan Review	1	0
Transcript	Business Rule Service	8	0
Transcript	OCR Service	6	0

## My Documents/Import

The screenshot displays the Visual Data Software interface. On the left is a navigation pane with a tree view under 'Documents' containing 'Queues', 'My Documents', 'Document Review', and 'Document Searching'. Below this is a sidebar with buttons for 'Documents', 'Settings', 'Calendar', and 'Time & Attendance'. The main area is split into two windows:

- My Documents:** Shows a toolbar with 'Checkin', 'View', 'Download', and 'Import Document'. The file list contains 'Root' and 'Travel Request Supporting Doc.docx (Checked Out To System User)'.
- Import:** A dialog box with the following fields and options:
  - Folder:** \Root (with a 'Browse' button)
  - File:** Choose File (No file chosen)
  - Document Type:** Unassigned (dropdown menu)
  - Share:**
  - Index Options:**
    - Send to Review Queue for Indexing
    - Index Now
  - Index Fields:** A table of input fields:
 

DMS #	<input type="text"/>
Classification	<input type="text"/>
Compartment	<input type="text"/>
Agency Control #	<input type="text"/>
Individual/Group Access	<input type="text"/>
From (Name):	<input type="text"/>
From	<input type="text"/>

Below the 'My Documents' window, a 'Recent Documents' list is visible, showing entries like 'Travel Request', 'Testing4.docx', 'TopSecretManu', 'Testing.docx', and 'TopSecretManu'.

Document Review

The screenshot displays the Visual Data Document Review application. On the left, a sidebar contains navigation options: Documents, Reports, Settings, Calendar, Time & Attendance, and Travel. The main window is titled 'Document Review' and shows document details for 'Star Wars Story.docx' (Document ID: 1138, File Size: 1311 KB, 2 pages). A 'Spell Check' sidebar is open, showing fields for DNS #, Classification, Comment, Agency Control #, Individual/Group Access, From (Name), From (Agency/Div), To (Name), To (Agency/Div), and Doc Date. The main document content area displays the text of the 'Star Wars Story' document, which includes a title and three paragraphs of text. At the bottom of the document area, there is a 'Download' button. The system clock in the bottom right corner shows 'Tuesday, March 27, 2012'.

## Document Searching

DocWarehouse - Customer Portal

Documents

- Document
- Outbox
- My Documents
- Document Review
- Document Searching
- Create Batch Header

Document Search

Search

Show ALL Results

Documents

Standard Fields Doc/Fields

Select Document Area

Document Type: ALL

Document Status: All

Created By: [ ]  Folders: [ ]

Created Between: [ ] and [ ]  Full Text: [ ]

File Name: [ ]  Extension: [ ]

Field	Searches	Value	Value
DocumentID	[ ]	[ ]	[ ]
Agency Control #	[ ]	[ ]	[ ]
Agency ID	[ ]	[ ]	[ ]
Classification	[ ]	[ ]	[ ]
Date Rec'd	[ ]	[ ]	[ ]
Doc Date	[ ]	[ ]	[ ]
WFO #	[ ]	[ ]	[ ]
Incoming or Outgoing	[ ]	[ ]	[ ]
Name	[ ]	[ ]	[ ]
Subject/Title	[ ]	[ ]	[ ]
Time Rec'd	[ ]	[ ]	[ ]

DocWarehouse - Customer Portal

Documents

- Document
- Archive
- Reports
- Settings

Document Search

Search

Show ALL Results

Documents

Standard Fields Doc/Fields

Select Document Area

Document Type: ALL

Document Status: All

Created By: [ ]  Folders: [ ]

Created Between: [ ] and [ ]  Full Text: [ ]

File Name: [ ]  Extension: [ ]

General Audit Searches

Viewed Between: [ ] and [ ]

Checked Out Between: [ ] and [ ]

Checked In Between: [ ] and [ ]

Viewed By: Admin, System(SystemAdmin)

Checked Out By: Admin, System(SystemAdmin)

Checked In By: Admin, System(SystemAdmin)

## Save Searches

Doc Warehouse - Customer Portal

**Documents**

- My Documents
- Document Review
- Document Searching
- Create Babh Header

---

**Documents**

- Archive
- Reports
- Settings

**Document Search**

Search

Show ALL Results

Show My Results

**Standard Fields** **Custom Fields**

Select Document Area

Document Type: ALL

Document Status: All

Created By: [ ] Folder: [ ]

Created Between: [ ] and [ ]

File Name: [ ] Extension: [ ]

Save My Search: [ ] (Save) [ ] Inclusion

Load Search: [ ] (Load) (Delete)

Share With Groups:

- Administrators
- Chairman
- Chief Clerk
- Committee Scribble - Black Tiger
- Committee Scribble - Everyone
- Committee Scribble - Green Tabby
- Committee Scribble - Purple Panther
- Committee Scribble - Red Lion
- Confidential - Black Mamba
- Confidential - Brown Komodo
- Confidential - Everyone
- Confidential - Orange Snake
- Confidential - Pink Turtle
- Deputy Staff Director
- For Official Use Only - Each
- For Official Use Only - Everyone
- For Official Use Only - Japhie
- For Official Use Only - Man
- For Official Use Only - Sabun
- For Official Use Only - Veruca
- General Counsel
- Law Enforcement Scribble - Bahara
- Law Enforcement Scribble - Daggobah
- Law Enforcement Scribble - Ground Faust
- Law Enforcement Scribble - Everyone

Document View

Document View

Save Cancel Favorites CheckOut Send To Doc Review Send To Annotation Review Send to OCR Attach Document Decrypt Message

DocumentID: 1062	Document Type: Biography	Created By: Sean Smoker	Published Path:
Version: 1	Document Name: TestingDocument.docx	Created On: 3/6/2012 4:35:03 PM	Published Version:
Folder: Root	Checked Out To:	Retention Date:	
File Size: 12.57 KB	Shared: <input checked="" type="checkbox"/>		

Fields
Notes
History
Failures
Reviews

File
PaperClips
Data History
Versions
Asset
Events
Messages

Spell Check

Registry #	<input type="text"/>
Classification	<input type="text"/>
Compartment	<input type="text"/>
Agency Control #	<input type="text"/>
Individual/Group Access	<input type="text"/>
Paper Clip	<input type="text"/>
From (Name):	<input type="text"/>
From (Agency/Org):	<input type="text"/>
To (Name):	<input type="text"/>
To (Agency/Org):	<input type="text"/>
Document Type	<input type="text"/>
Doc Date	<input type="text"/>
Date Rcvd	<input type="text"/>
Time Rcvd	<input type="text"/>

Text

Stadium Arcadium

Mellon Collie and the Infinite Sadness

Sam's Town

Staind

Wasting Light

Hefty Fine

Holy Wood

The House In the Mist

Rosenrot

<div style="background-color: #eee; padding: 2px; border-bottom: 1px solid #ccc;">Document</div> <div style="padding: 2px;">TestingDocument.docx</div>	<div style="background-color: #eee; padding: 2px; border-bottom: 1px solid #ccc;">Download</div>
--	--



Reports

**Reports**

From Date: 1/22/2012  
 To Date: 2/3/2012

**CONSOLIDATED REPORT OF EXPENDITURE OF FUNDS  
 FOR FOREIGN TRAVEL BY MEMBERS AND EMPLOYEES OF THE U.S. SENATE,**  
 Under Authority of Sec. P.L. 95-384-22 U.S.C. 1754(b)

Travel from 01/22/2012 to 02/03/2012

Name	Country	Currency	Per Diem	Transportation	Misc	Total
Brad Trebilcock	USA	Dollar	\$295.00	\$50.00	\$22.00	\$407.00
Diana Johnson	France	Franc	\$100.00	\$100.00	\$100.00	\$300.00
Keith Mason	USA	Dollar	\$200.00	\$62.00	\$57.00	\$319.00
<b>TOTALS:</b>			<b>\$595.00</b>	<b>\$252.00</b>	<b>\$179.00</b>	<b>\$1,026.00</b>

Signed: \_\_\_\_\_  
 Chairman, Committee on \_\_\_\_\_ Date: \_\_\_\_\_

**Document Audit Tracking**


From 1/01/2012 to 04/23/2012

Activity Date/Time	Description	Document ID	Document Name	User Name	IP Address
4/3/2012 11:50:54 AM	View	1222	ScannedDoc_1222.pdf	House Administrator	192.168.0.10
4/3/2012 11:52:07 AM	View	1222	ScannedDoc_1222.pdf	House Administrator	192.168.0.10
4/3/2012 11:53:39 AM	View	1222	ScannedDoc_1222.pdf	House Administrator	192.168.0.10
4/3/2012 11:57:01 AM	View	1222	ScannedDoc_1222.pdf	House Administrator	192.168.0.10
4/3/2012 12:00:08 PM	View	1222	ScannedDoc_1222.pdf	House Administrator	192.168.0.10
4/4/2012 10:03:13 AM	View	1222	ScannedDoc_1222.pdf	House Administrator	192.168.0.5
4/5/2012 3:05:21 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:07:43 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:09:37 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:09:37 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:09:58 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:13:44 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:25:25 PM	View	1226	ScannedDoc_1226.pdf	VDS SuperUser	127.0.0.1
4/5/2012 3:51:09 PM	View	1222	ScannedDoc_1222.pdf	VDS SuperUser	127.0.0.1
4/8/2012 11:15:00 PM	View	1222	ScannedDoc_1222.pdf	VDS SuperUser	127.0.0.1
4/8/2012 11:20:34 PM	View	1222	ScannedDoc_1222.pdf	VDS SuperUser	127.0.0.1
4/8/2012 11:28:56 PM	View	1222	ScannedDoc_1222.pdf	VDS SuperUser	127.0.0.1
4/8/2012 11:31:53 PM	View	1222	ScannedDoc_1222.pdf	VDS SuperUser	127.0.0.1

DocWarehouse - Customer Portal

Reports Rescan Review

14 1 of 1 100% Print Next Select a format Export

 **Rescan Review**  
 As of: 4/25/2012 2:18:42 PM

Box Number	Batch ID	Document ID	Barcode
12RYZ	3087	1226	ARCH-2020-0781

Page 1 of 1


DocWarehouse - Customer Portal

Reports User Audit Tracking

From Date: 2/7/2012 To Date: 4/23/2012 Use: All Users

Search

14 1 of 35 100% Print Next Select a format Export

 **User Audit Tracking**  
 As of: 4/23/2012 to 4/23/2012

Activity Date/Time	Description	User Name	IPAddress
3/31/2012 8:27:11 PM	API - Logout	House Administrator	
3/31/2012 8:27:12 PM	API - Get Applications	House Administrator	
3/31/2012 8:27:12 PM	API - Get User Info By Name	House Administrator	
3/31/2012 8:27:16 PM	API - Get MachineID	House Administrator	
3/31/2012 8:27:16 PM	API - Get Projects	House Administrator	
3/31/2012 8:27:37 PM	API - Get Projects	House Administrator	
3/31/2012 8:27:38 PM	API - Get Batch Types	House Administrator	
3/31/2012 8:27:39 PM	API - Get Batch Type Document Types	House Administrator	
3/31/2012 8:27:42 PM	API - Get Project Document Types	House Administrator	
4/1/2012 4:48:11 PM	API - Logout	House Administrator	
4/1/2012 4:48:11 PM	API - Get Applications	House Administrator	
4/1/2012 4:48:11 PM	API - Get User Info By Name	House Administrator	
4/1/2012 4:48:13 PM	API - Get MachineID	House Administrator	
4/1/2012 4:48:13 PM	API - Get Projects	House Administrator	
4/1/2012 4:59:50 PM	API - Logout	House Administrator	
4/1/2012 4:59:50 PM	API - Get Applications	House Administrator	

## Sys Tray

DocWarehouse™ SysTray - Check-In

File Info

Files Name	File Size	Status
C:\Users\stein.VISUALDATASOFT\Desktop\CTRMA_EDMS...		

Remove Selected File

Options

Document Type

Index Now

Insert Into Default DocType Folder

Use Default DocType Security Profile

Authentication Type

Unassigned

Login Name

Cancel Check-In

Status: toolStripStatusLabel2

DocWarehouse™ SysTray

Drag and Drop File(s) Here

Scan Client

The screenshot shows the Visual Data Software interface. On the left, there is a grid of document thumbnails. On the right, a list of scanned documents is displayed, including names, IDs, and facility names. Handwritten signatures are present next to many of the entries.

Name	ID	Facility	Signature
Montrose, Jacob L.	11761850232-MSL	Fulton Reception Diagnostic Center	<i>Bob</i>
Jackson, Clarence E.	11761802262-Ful	Onondaga Correctional Center	<i>Muhom</i>
Kohler, David A.	00CR127833-01-Ful	Fulton Reception Diagnostic Center	<i>Phil</i>
Lee, Denise M.	01CR128227-01-Ful	Women's Eastern Reception & Diagnostic Center	<i>Denise</i>
Leo, Jr., Michael A.	02CR128775-Ful	Fulton Reception Diagnostic Center	<i>Tanya</i>
Levent, Chad D.	02CR128229-Ful	Fulton Reception Diagnostic Center	<i>Tanya</i>
Loy, James C.	02CR128249-Ful	Fulton Reception Diagnostic Center	<i>Steve</i>
Lyon, Philip B.	CR106-125464-Med	Fed. Medical Cr., Lexington, KY	
Morris, Charles R.	01CR129829-Med	Farrington Correctional Center	<i>Div 7 mail</i>
Mull, Mike A.	01CR132058-Ful	Fulton Reception Diagnostic Center	<i>Phil</i>
Mull, Anthony M.	01CR127824-Ful	Jefferson County, KY	<i>Div 8 filing</i>
Paterson, Don	117618106438-Ful	Northwest Cor. Center, Tipton Co, TN	
Fulcr, Robert R.	02CR128353-Ful &		<i>Seung</i>
	02CR128354-Ful	Fulton Reception Diagnostic Center	<i>Seung</i>
YES Paul, Charles D.	01CR132034-Ful	Fulton Reception Diagnostic Center	<i>John</i>
Schuler, Anthony R.	01CR132068-Med	Boone Co Correctional Center	<i>John</i>
Theriot, Priscy J.	117618022374-01-Ful	Fulton Reception Diagnostic Center	<i>John</i>
Tourand, Denise R.	01CR131571-Ful		<i>Paul</i>
	01CR131564-Ful &		<i>Denise</i>
	01CR132047-Ful	Women's Eastern Reception & Diag Center	<i>Denise</i>
YES Troy, Daniel P.	01CR131045-Med	Mobley Correctional Center	<i>John</i>
Tyler, Dennis A.	01CR128787-Ful	Fulton Reception Diagnostic Center	<i>Denise</i>
Walters, William P.	117618000356-01	Fulton Reception Diagnostic Center	<i>Robert</i>
Williams, Mark S.	01CR132068-Med	Fulton Reception Diagnostic Center	<i>Jayna</i>
Wilkins, Robert B.	01CR132067-Med &		<i>Jayna</i>
	01CR132066-Ful	Fulton Reception Diagnostic Center	<i>Denise</i>
YES Wilkie, Timothy D.	01CR132104-Med	Boonville Correctional Center	<i>John</i>
YES Wilson, Deangelo D.	02CR124028-Ful	Jefferson City Correctional Center	<i>John</i>
Wolf, Charles D.	01CR131408-Ful	Fulton Reception Diagnostic Center	<i>Denise</i>

4 Page 2

Form Studio

Visual DocWarehouse - Form Studio

File Forms Objects Help

Domestic Relation Case Form  
Page 1  
Page 2  
Page 3  
Employment Case Form  
Page 1  
Page 2  
Food Stamp Program Application  
Page 1  
Health Care Case Form  
Page 1

**COMMONWEALTH OF VIRGINIA  
DEPARTMENT OF SOCIAL SERVICES**

**APPEAL TO STATE DEPARTMENT OF SOCIAL SERVICES**

TO: HEARING AND LEGAL SERVICES MANAGER  
VIRGINIA DEPARTMENT OF SOCIAL SERVICES  
7 NORTH EIGHTH STREET  
RICHMOND, VIRGINIA 23219-3301

COUNTY/CITY: \_\_\_\_\_  
CASE NUMBER: \_\_\_\_\_  
NAME: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CITY, STATE, ZIP: \_\_\_\_\_

TO BE VALID/TIMELY, FOOD STAMP APPEALS MUST BE RECEIVED WITHIN 30 DAYS OF WRITTEN NOTICE OF THE LOCAL AGENCY DECISION. ALL OTHER APPEAL REQUESTS MUST BE RECEIVED WITHIN 30 DAYS OF WRITTEN NOTICE OF THE LOCAL AGENCY DECISION. ALL APPEAL REQUESTS MUST MEET APPROPRIATE DEADLINES AS REQUIRED BY LAW. THERE IS NO REQUIREMENT THAT MY REQUEST FOR AN APPEAL IN FOOD STAMPS OR TANF BE MADE IN WRITING. THE REQUEST MAY BE ORAL.

MY APPEAL IS IN REGARD TO THE FOLLOWING PROGRAM(S):

TEMPORARY ASSISTANCE FOR NEEDY FAMILIES (TANF)  ENERGY ASSISTANCE (LIMITED TO ITEMS WITH \*\*\* ASTERISK)

FOOD STAMPS  SERVICES (e.g., ADULT SERVICES, CHILD CARE)

GENERAL RELIEF  REFUGEE CASH ASSISTANCE

AUXILIARY GRANTS  REFUGEE MEDICAL ASSISTANCE

OTHER: \_\_\_\_\_

**ATTENTION:**  
ACCORDING TO THE PROVISIONS OF THE VIRGINIA PUBLIC WELFARE AND ASSISTANCE LAW, AS AMENDED, I DO HEREBY APPEAL FOR A REVIEW OF THE (PROPOSED) ACTION OF THE DEPARTMENT OF SOCIAL SERVICES IN THE COUNTY/CITY OF: \_\_\_\_\_ FOR THE REASON(S) CHECKED BELOW:

<input type="checkbox"/> REFUSAL TO TAKE MY APPLICATION FOR ASSISTANCE OR SERVICES*	<input type="checkbox"/> REFUSAL TO TAKE MY APPLICATION FOR FOOD STAMPS	<input type="checkbox"/> DECLARING ME INELIGIBLE FOR ASSISTANCE OR SERVICES*	<input type="checkbox"/> DECLARING MY HOUSEHOLD INELIGIBLE TO PARTICIPATE IN THE FOOD STAMP PROGRAM
<input type="checkbox"/> SUSPENDING MY ASSISTANCE OR SERVICES	<input type="checkbox"/> FAILURE TO PROVIDE EXPEDITED SERVICE ON MY FOOD STAMP CASE	<input type="checkbox"/> CANCELING MY ASSISTANCE OR SERVICES*	<input type="checkbox"/> CANCELING MY FOOD STAMPS
<input type="checkbox"/> FAILURE TO TAKE ACTION ON MY REQUEST FOR AN INCREASE IN MY ASSISTANCE OR SERVICES WHICH WAS MADE ON: _____ DATE: _____	<input type="checkbox"/> FAILURE TO RENDER A DECISION ON MY APPLICATION FOR ASSISTANCE OR FOOD STAMPS WITHIN THE ALLOWABLE TIME LIMIT.* APPLICATION WAS MADE ON: _____ DATE: _____	<input type="checkbox"/> DECREASING MY ASSISTANCE FROM \$ _____ TO \$ _____	
<input type="checkbox"/> AWARDED ME INSUFFICIENT ASSISTANCE OF \$ _____	<input type="checkbox"/> DECREASING MY FOOD STAMP ALLOTMENT	<input type="checkbox"/> DECREASING MY SERVICES FROM _____ DAYSHOURS TO _____ DAYSHOURS	

OTHER (EXPLAIN): \_\_\_\_\_

I BELIEVE I AM ELIGIBLE FOR ASSISTANCE, SERVICES, OR FOOD STAMPS OR AN INCREASE IN ASSISTANCE OR SERVICES OR ADJUSTMENT IN FOOD STAMPS BECAUSE:  
\_\_\_\_\_  
\_\_\_\_\_

I UNDERSTAND THAT ANY ASSISTANCE AND/OR FOOD STAMP BENEFITS RECEIVED UNTIL A HEARING DECISION IS GIVEN MUST BE REPAYED TO THE AGENCY IF THE HEARING DECISION SUPPORTS THE ACTION BEING PROPOSED BY THE AGENCY.

I WISH MY FOOD STAMP BENEFITS TO CONTINUE UNTIL A HEARING DECISION IS RENDERED:  YES  NO

I WISH MY ASSISTANCE OR SERVICES TO CONTINUE UNTIL A HEARING DECISION IS RENDERED:  YES  NO

I RECEIVED A LETTER FROM THE SOCIAL SERVICES DEPARTMENT ON (DATE) \_\_\_\_\_ NAME ADDRESS TELEPHONE OF CLAIMANT'S LEGAL REPRESENTATIVE (IF SELECTED) \_\_\_\_\_  
CLAIMANT SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

032-03-0024-09-ens (7/04)

Database: ENDOR User: Keith Mason Organization: Visual Data Software Project: Orange County NC

Page Object Properties

Object Type: Barcode

Barcode Properties

Symbology: Code 39

Rotation: RSS-14

Comment: RSS-Limited

Comment Alignment: PostNET

Bar Height (mils): 1000

Narrow Bar Width (mils): 13

Narrow to Wide Ratio: 25

Font Size: 9

Font Color: 9

Code 39 CheckDigit:

Code 39 Start/Stop Characters:

Codebar Optional CheckDigit:

Interleaved 2 of 5 Optional CheckDigit:

UCC/EAN 128 Optional CheckDigit:

PDF Security Level: 9

PDF Truncated Symbol:

Comment On Top:

Text On Top:

Display Human Readable Text:

Page Object Properties

Object Type: Data Field

Data Field Properties

Existing Data Field: Signature Date

Display Order: 38

New Field

Data Type: Date (MM/DD/YYYY)

Field Name: Signature Date

Label: Date Signed

Regular Expression: mm/dd/yyyy

Min Length: 10

Max Length: 10

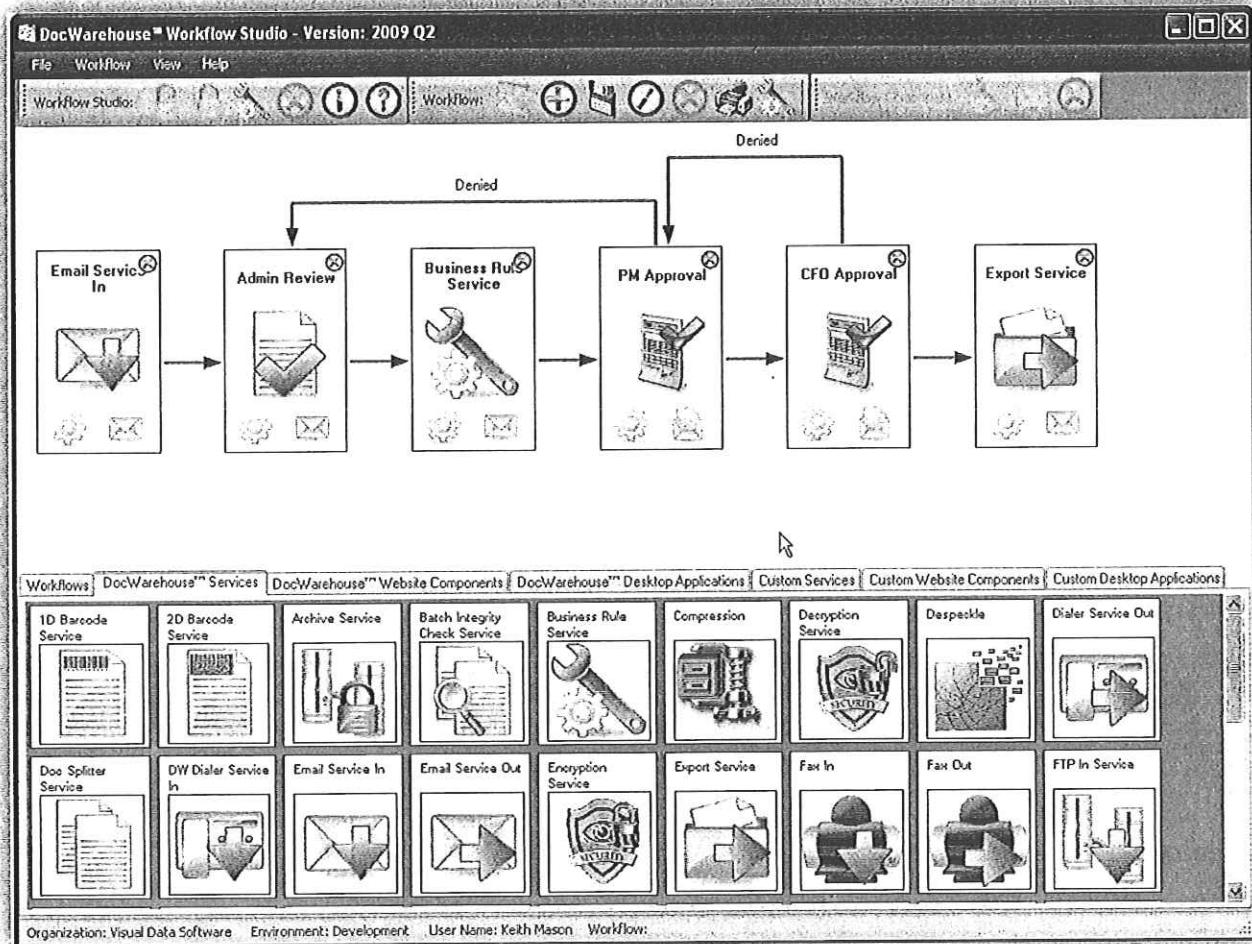
Tool Tip: Enter the Signature Date

Merge Tag: <<SignatureDate>>

List Entries

Entry to Add

## Workflow Studio



Redaction

CE  
Regiona

March 17, 2010

Troy Dover  
Vice President Operations and Marketing  
Infrastructure Corporation of America  
[REDACTED]  
Brentwood, TN 37027

Re: Highway Emergency Response Operation Patrol Services Procurement

Dear Mr. Dover:

The Central Texas Regional Mobility Authority ("CTRMA") appreciates your response to our Request for Proposals ("RFP") for Highway Emergency Response ("HERO") Patrol Services.



Digital Signature



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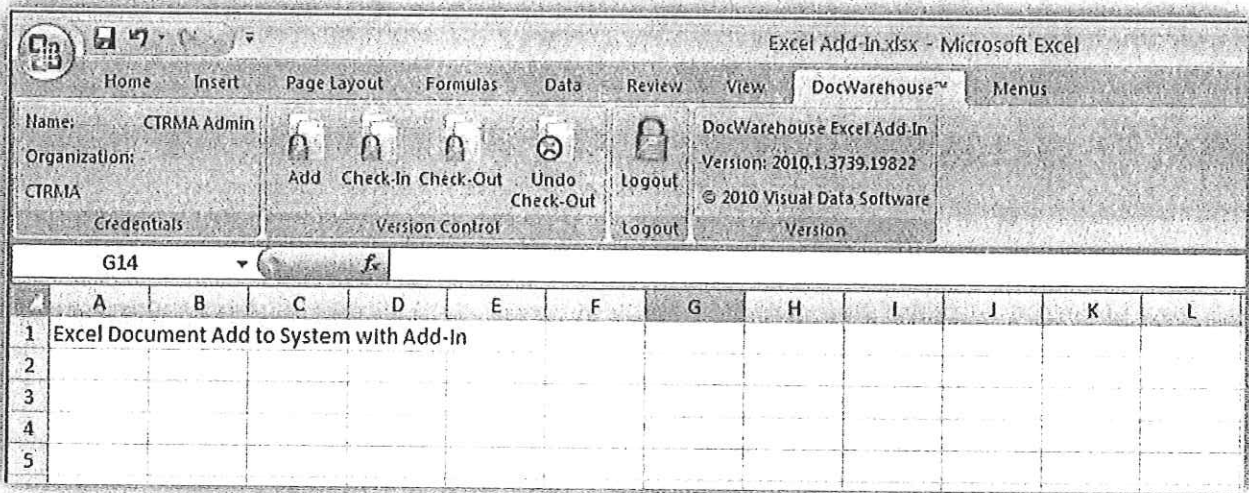
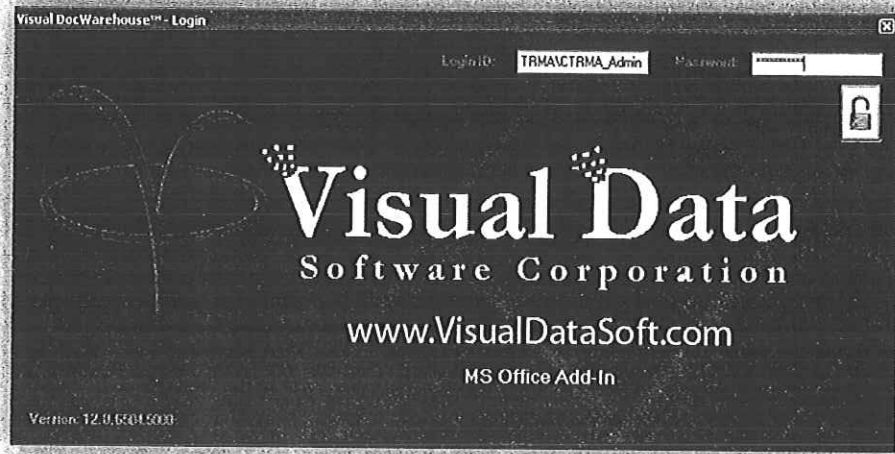


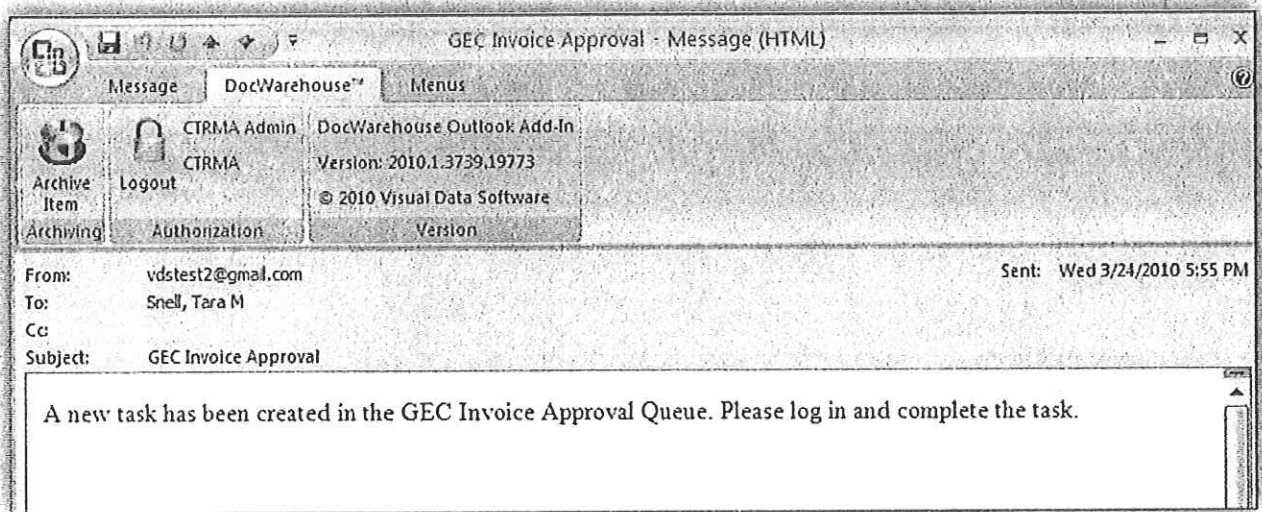
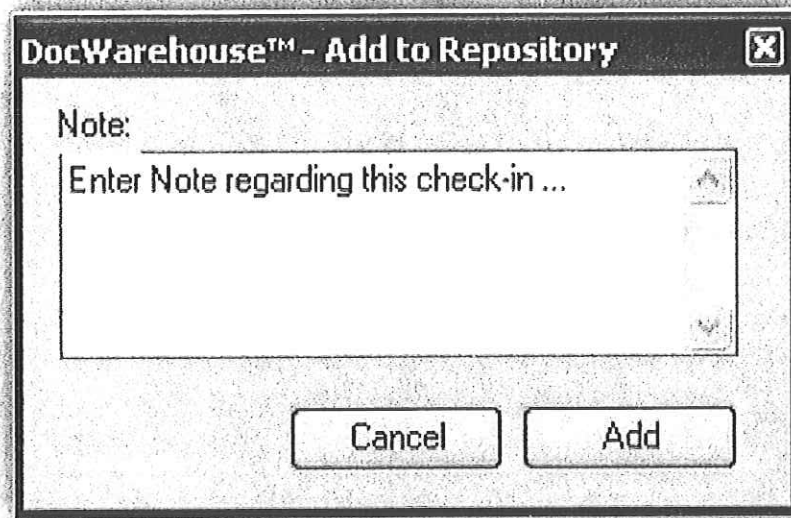
**CENTRA**  
**Regional Mobility Authority**

March 17, 2010

Troy Dover  
Vice President Operations and Marketing  
Infrastructure Corporation of America  
5110 Maryland Way, Suite 280

MS Office Add-Ins







WV-96A  
Rev. 9/11

AGREEMENT ADDENDUM FOR SOFTWARE

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 provision 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. *Fees for software licenses, subscriptions, or maintenance are payable annually in advance. Payment for services will be in arrears.*
6. **INTEREST** - Any provision for interest or charges on late payments is deleted. The Agency has no statutory authority to pay interest or late fees.
7. **NO WAIVER** - Any language in the agreement requiring the Agency to waive any rights, claims or defenses 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. **FEES OR COSTS** - 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. *In such event, Agency will not be entitled to a refund of any software license, subscription or maintenance fees paid.*
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 deleted. The agreement may be renewed only upon mutual written agreement of the parties.
17. **INSURANCE** - Any provision requiring the Agency to purchase insurance for Vendor's property is deleted. The State of West Virginia is insured through the Board of Risk and Insurance Management, and will provide a certificate of property insurance upon request.
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: Visual Data Software Corporation

Signed: [Signature]

Title: President

Date: 6-19-12

ATTACHMENT  
P.O.# TAX12008

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

President  
Title

Visual Data Software Corporation  
Company Name

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

\_\_\_\_\_  
Title

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

State of West Virginia  
**VENDOR PREFERENCE CERTIFICATE**

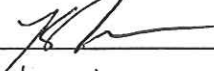
Certification and application\* is hereby made for Preference in accordance with *West Virginia Code*, §5A-3-37. (Does not apply to construction contracts). *West Virginia Code*, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. 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. **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,  
 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,  
 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. **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. **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. **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. **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. **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: Visual Data Software Corporation Signed:   
 Date: 6-19-12 Title: President

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

STATE OF WEST VIRGINIA  
Purchasing Division

**PURCHASING AFFIDAVIT**

West Virginia Code §5A-3-10a states: 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.

**DEFINITIONS:**

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**EXCEPTION:** The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

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.

**WITNESS THE FOLLOWING SIGNATURE**

Vendor's Name: Visual Data Software Corporation

Authorized Signature: [Signature] Date: 6/18/12

State of Kansas

County of Douglas, to-wit:

Taken, subscribed, and sworn to before me this 18 day of June, 2012.

My Commission expires 5/24, 2015.

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]





**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: TAX12008**

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

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


**Addendum Numbers Received:**

(Check the box next to each addendum received)

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

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that 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.

Visual Data Software Corporation  
Company

  
Authorized Signature

6-19-12  
Date

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