



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

# Solicitation

NUMBER
BOM140018

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
BOB KILPATRICK
304-558-8802

\*404131949 701-839-7523

VENDOR

ALBERTSON CONSULTING INC  
 21 MAIN ST SOUTH

MINOT ND 58701

SHIP TO

WV BOARD OF MEDICINE  
 101 DEE DRIVE  
 SUITE 103  
 CHARLESTON, WV  
 25311 304-558-2921

DATE PRINTED
01/30/2014

BID OPENING DATE: 02/26/2014

BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		205-62		
LICENSURE MANAGEMENT DATABASE SYSTEM AND SERVICES  THE WEST VIRGINIA PURCHASING DIVISION, ON BEHALF OF THE AGENCY, THE WV BOARD OF MEDICINE, IS SOLICITING BIDS FOR A CONTRACT TO PROVIDE FOR THE ONE-TIME PURCHASE OF A LICENSURE MANAGEMENT SOFTWARE SOLUTION, INCLUDING WEBSITE DESIGN, CONTENT MANAGEMENT DATABASE SYSTEM, ADMINISTRATIVE INTERFACE AND CLOUD-BASED DOCUMENTATION PROGRAM, ALL TO STREAMLINE THE BOARD'S OPERATIONS IN THE AREAS OF LICENSING, RENEWALS, DISCIPLINE AND REGULATION, AND ALL PER THE ATTACHED DOCUMENTATION.  ATTACHMENTS INCLUDE:  1. INSTRUCTIONS TO VENDORS SUBMITTING BIDS 2. GENERAL TERMS AND CONDITIONS 3. BOM140018 SPECIFICATIONS (INCLUDING PRICING PAGE) 4. CERTIFICATION AND SIGNATURE PAGE 5. PURCHASING AFFIDAVIT 6. RESIDENT VENDOR PREFERENCE (RVP) FORM  ***** THIS IS THE END OF RFQ BOM140018 ***** TOTAL: _____  02/21/14 09:49:33AM West Virginia Purchasing Division						

SIGNATURE	TELEPHONE	DATE
	701-839-7523	2/19/2014
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
CEO/President/owner	45-0459847	

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

# 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:**

N/A 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. **Application is made for 2.5% resident vendor preference for the reason checked:**

N/A 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:**

N/A 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:**

N/A 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:**

N/A 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:**

N/A 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.

7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with West Virginia Code §5A-3-59 and West Virginia Code of State Rules.**

N/A Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

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: Albertson Consulting Inc.

Signed: [Signature]

Date: 2/20/2014

Title: President/CEO/owner

**CERTIFICATION AND SIGNATURE PAGE**

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

Albertson Consulting Inc  
(Company)

  
(Authorized Signature)

Daniel Albertson  
(Representative Name, Title)

701-839-7523  
(Phone Number) (Fax Number)

2/20/2014  
(Date)



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

**Solicitation**

NUMBER
BOM140018

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
BUYER 44 304-558-2306

RFQ COPY

TYPE NAME/ADDRESS HERE

VENDOR

Albertson Consulting Inc  
 21 main street south  
 Minot, ND 58701  
 701-839-7523

SHIP TO

WV BOARD OF MEDICINE  
 101 DEE DRIVE  
 SUITE 103  
 CHARLESTON, WV  
 25311 304-558-2921

DATE PRINTED
02/19/2014

BID OPENING DATE: 02/26/2014 BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 1						
ADDENDUM IS ISSUED:						
1. TO PROVIDE RESPONSES TO VENDORS' QUESTIONS REGARDING THE ABOVE SOLICITATION. QUESTION AND ANSWER PAGES ARE ATTACHED.						
2. TO PROVIDE ADDENDUM ACKNOWLEDGMENT. THIS DOCUMENT SHOULD BE SIGNED AND RETURNED WITH YOUR BID. FAILURE TO SIGN AND RETURN MAY RESULT IN THE DISQUALIFICATION OF YOUR BID.						
***** END OF ADDENDUM NO. 1 *****						

SIGNATURE	TELEPHONE	DATE
	701-839-7523	2/20/2014
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
CEO/President/owner	45-0459847	

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

SOLICITATION NUMBER: BOM140018

Addendum Number: 1

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The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

**Applicable Addendum Category:**

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

**Description of Modification to Solicitation:**

1. To provide copy of vendor questions and responses.
2. To provide Addendum Acknowledgment form.

**Additional Documentation:** Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

**Terms and Conditions:**

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: BOM140018**

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

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

**Addendum Numbers Received:**

(Check the box next to each addendum received)

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

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

Albertson Consulting Inc.  
Company

  
Authorized Signature

2/20/2014  
Date

ATTACHMENT A



# State of West Virginia *Board of Medicine*

0004

REV. O. RICHARD BOWYER  
PRESIDENT

LETITIA E. TIERNEY, MD, JD  
SECRETARY

101 Dee Drive, Suite 103  
Charleston, WV 25311  
Telephone 304.558.2921  
Fax 304.558.2084  
www.wvbom.wv.gov

MICHAEL L. FERREBEE, MD  
VICE PRESIDENT

ROBERT C. KNITTLE  
EXECUTIVE DIRECTOR

System Automation questions regarding State of West Virginia Solicitation number BOM140018  
For the West Virginia Board of Medicine.

1. The solicitation cover sheet says to send correspondence to Bob Kilpatrick, however, it says questions and proposals should be sent to Dean Wingerd. Who should receive the questions and proposal? **Dean Wingerd**
2. Will the agency provide all vendors with a copy of all questions and answers received and answered by the Board? **Yes**
3. As the Board is looking for the vendor to provide a website that includes more than just licensing services, can the Board be more specific as to what the agency website will need to include? Who is responsible for managing this content? **A visit to our current website will provide you with the array of information offered to the public and to licensees**
4. Who will provide the content for the agency website? **The Board of Medicine staff – more specifically the IT Coordinator**
5. Who will be responsible for on-going updates to the agency website? **The IT Coordinator**
6. Has the Board identified system administrators who will administer the licensing system after system acceptance? **The Board IT Coordinator will be the systems administrator with support from the vendor. Most if not all communication with the vendor will be through the IT Coordinator.**
7. What is the budget for this project? **We do not issue budget figures for this project.**
8. Can the Board provide additional system requirements so a vendor can determine what type of customization may be necessary? **Additional system requirements would be contingent upon the legislative changes in mandates which cannot be predicted.**



9. What is meant by "cloud-based documentation program?" **A program whereby you can access our database wirelessly pull up information made available for board members, make notes, highlight, etc. and place it back into the system to be pulled up for committee/board meetings**
10. Please provide the technical interface requirements for the Boards credit card payment processor? **Credit card interface is handled by the WV Treasurers Office who would continue to control this aspect**
11. What payment methods does the Boards credit card payment processor accept? **Licensees may pay their license/certification/renewal fees and any disciplinary fines by credit card.**
12. Does the agency have current documents or images that will need to be migrated into the new document repository? If so, how many, of what format, number of pages, etc.? **The intent is to transfer our existing database to the new system and move forward. We have a voluminous amount of paper historical files however the electronic conversion of these files is not part of this project.**
13. Can the Board provide additional details regarding "must provide a portal dashboard?" **A dashboard from which staff can gain access to different areas of the database from difference portals or perspectives such as licensee historical information, complaints, malpractice, application process and sort appropriately**
14. What is the preferred database platform for the new licensing system? **The current database is written in Microsoft SQL which we are comfortable with.**
15. Does the agency have an experienced database administrator who will be able to perform "data-mining searches?" **Yes**
16. Will the Board be able to extract all current legacy data to support the data conversion effort? **Yes**
17. Please confirm that the Board wants the vendor to support the agency users and all licensees? **Staff yes: licensees will have access to their address in order to make changes which would be pended until reviewed by staff**
18. Please confirm that the Board wants the vendor to support the agency users and all licensees 24 x 7? **The Board seeks vendor support 24x7 due to our obligations to our Board Members and licensees which do not always occur during a customary 8 hour work day. Direct support to licensees is not required.**

19. Do the RFP/RFQ signature pages need to be signed and provided as part of a vendor proposal or upon award of contract. **The Certification and Signature Page, which was page number 35 of the RFQ package needs to be signed and submitted with the vendor proposal or bid.**
20. Can the board provide additional requirements regarding this statement? The RFQ states that " All customization of the software required to meet the requirements of the Request for Quotation and the Board, and to achieve Acceptance, shall be included in the base bid" How is a vendor to fully understand/quantify what are the requirements of the Board, and what are the requirements to achieve acceptance. To build up an accurate base bid price, the vendors would need to understand these additional requirements. **The requirements required by the Board are spelled out in the text of the RFQ.**
21. Does the Board export license information to any outside agencies; for example: AMA, FSMB, VeriDoc? **Yes for these three and two local entities, the State Medical Association and West Virginia University.**
22. How many licenses, wallet cards and certificates will be printed from the database, and are each separate files? **In 2013 we licensed 531 MDs, 4 DPMs, 86 PAs, 19 Medical Corporations and 22 PLLCs. Each received a license or certificate. Each licensee received a wallet card. We have issued approximately 334 Drug Dispensing Certificates and 225 Med. Corp. and PLLC renewal certificates. We also issued approximately 1,000 prescriptions writing privilege and/or change of location/supervisor certificates to PAs. They are separate files by licensee which is more of a feature of the current database than a preference. In 2015 we have biennial renewals for approximately 800 PAs as well as for half or 3,400 the licensed MDs. Some of the PA requirements will be greatly reduced if current legislation to modernize the PA statute and legislative rule is passed.**
23. What is the total number of online application forms? **14 plus we use the FSMB Uniform Application for MS initial applications. There are also several other forms online under the "Forms" section that we utilize. These forms currently have to be downloaded to paper to complete?**
24. What is the total number of online renewal forms? **5 The biennial renewals for MD and DPMs can be completed online and submitted. The PA renewal still has to be reduced to paper and sent in as do the Med. Corp. and PLLC renewal applications.**

CONFIDENTIAL

**ORIGINAL**

RFQ Response for  
**Online Licensure Database Management Software**

By

**Big Picture Software** (a product of Albertson Consulting Inc.)



Prepared for:

**West Virginia Board of Medicine**

In response to

**RFQ#BOM140018**

*February 18th, 2014*



**CONFIDENTIAL**

February 18th, 2014

Robert Knittle, Executive Director  
West Virginia Board of Medicine  
101 Dee Dr., Suite 103  
Charleston, WV 25311  
(304) 558-2084

Dear Mr. Knittle,

Thank you for the opportunity to present an Albertson Consulting Big Picture™ Licensure Management Database Proposal for your needs. The Big Picture™ License Management Database System is a complete web-based regulatory licensing, digital information and content management solution that will allow licensees, users and administrators to collaborate in one unified database/system.

Our unified online system facilitates a robust website, a powerful and flexible database interface and an administrative interface, so you are able to manage your day-to-day operations easily and efficiently. Our unified system leads to much lower support and operating costs long-term.

Our customers are not just numbers. They are partners with us in our business. It is critical to the success of our business that we execute every implementation and support contract successfully. We are excited about the opportunity to propose this solution and win your business long-term.

My signature on the bottom of this document confirms and is my word that we have read and fully understand the requirements within the RFQ. We will execute the project within the quoted price.

The cost proposal is valid for 90 days from the date of submission.

Regards,



Troy Rauschenberger, Director of Government Markets  
Big Picture Software  
21 Main Street South, Suite 201  
Minot, North Dakota 58701  
[troy@ebigpicture.com](mailto:troy@ebigpicture.com)

# Table of Contents

- Introduction.....5
- What We Offer .....5
- Corporate Experience.....6
- What Makes Us Different.....6
- In Closing .....7
- Understanding of Scope .....8
- Software Ownership.....8
- Data Conversion Service.....9
- Implementation Costs & Terms.....9
- 3. Response to RFQ General Requirements .....9
  - 3.1.1.2, 3.1.1.3, 3.1.1.4.....10
  - 3.1.1.5 Software Interfaces .....11
  - 3.1.2 Content Management Database System .....11
    - 3.1.2.1 Centralized Database .....11
    - 3.1.2.1 Integrated Document Management/ Repository.....11
    - 3.1.2.3 Internal Reminder System.....11
    - 3.1.2.4 Contact History .....11
    - 3.1.2.5 Portal integration and reporting .....12
    - 3.1.2.6, 3.1.2.7.....12
    - 3.1.2.8 Continuing Education & Accreditation Tracking .....12
    - 3.1.2.9.....12
    - 3.1.2.10.....12
    - 3.1.2.11.....13
    - 3.1.2.12 Search Panel .....13
    - 3.1.2.13.....13
    - 3.1.2.14 Inspections .....13
    - 3.1.2.15 Audit Trail/History View .....14
    - 3.1.2.16 Workflow Management – TASKS .....14
    - 3.1.2.17 Integrated batch administration/revenue collection software .....14
- 3.1.3 Administrative Interface.....15

- 3.1.3.1 Administrative Interface.....15
- 3.1.4 Cloud-Based Documentation Program.....15
  - 3.1.4.1 – 3.1.4.6 Big Picture CloudDocs.....15
- 4. Performance .....16
  - 4.1.1 – 4.1.6 Installation & Implementation .....16
  - 4.2 Acceptance .....17
    - System Testing.....17
  - 4.3 Maintenance & Support .....17
    - Support/Maintenance .....17
    - 4.3.1 User Help Desk .....17
      - 4.3.1.1 – 4.3.1.3 Customer Support/Help Desk.....17
    - 4.3.2 Software Patches & New Releases .....17
      - 4.3.2.1, 4.3.3.2, 4.3.3.3 Software Updates.....17
    - 4.3.3. Customization of the System .....18
      - 4.3.3.1 – 4.3.3.5 Configuring & Custom Development.....18
    - 4.3.4 Hosting Services .....18
      - 4.3.4.1 – 4.3.4.3 Free Hosting.....18
  - Exhibit A Pricing Page .....18

## Introduction

Albertson Consulting (Big Picture™ Software) is honored by the invitation to respond to this Request for Quote (RFQ) for the West Virginia Board of Medicine. We realize and understand the necessity of the sensitive timeline set-forth in this RFQ and fully comprehend the scope of this RFQ.

We believe that the West Virginia Board of Medicine will require licensure database management system that not only meets the board's current requirements but also has the configurability and flexibility to meet the board's future requirements. This will require a vendor who is mission-aligned, accountable and reliable and who demonstrates the competency to fully execute the requirements contained within the RFQ.

When it comes to **configurability, we are the champions**. Other software vendors may claim that they have the ability to easily configure, add or modify record types or record fields. With other vendors, any of these modification requests will, in most cases, require that you call their support line and incur some support costs. With Big Picture™ Software, we enable the customer to easily add record types, modify fields and create custom templates and forms. Our intuitive user interface gives complete control to our customers which not only provides cost savings and reduces support calls, but also saves time by allowing the customer to make modifications at any time.

Not only is deploying and supporting the software easier when you host your site with us; there is also a substantial cost savings for your agency. No additional equipment or technical resources are necessary. When Big Picture™ Software hosts your application, we provide easy access for your staff and board members. Our web-based application is always accessible via the Internet. Over 95% of our customers host their sites with us, and we provide the experience, knowledge, security and added peace-of-mind that comes with a professional hosting service like ours.

Albertson Consulting (Big Picture™ Software) is pleased to present this proposal which will outline our past experience, expertise and in-depth understanding of the needs and requirements of boards like yours.

## What We Offer

We are more than just a software licensing company. We pride ourselves on building long-term partner relationships with our customers – just ask any of them. We believe that every one of our customers is an asset to our continued growth and the ever evolving strength of our product. Software licensing for regulatory boards, such as your board, requires a licensure management database and software solution that has the maturity, sustainability and configurability to change as the boards' requirements change.

In our proposal, we offer the board a technology partner who will proactively respond to change, deliver on-time within budget and provide a level of continued customer service that we hope will surpass the board's expectations.

## Corporate Experience

Albertson Consulting, the parent company of the COTS Big Picture™ Software, was established in 2000. Since its inception, Albertson Consulting has engaged in the business of software development, support and hosting. In 2003, we deployed our first Big Picture™ Software solution, and we have been licensing and supporting it for clients across the nation ever since. Customers consistently appreciate our ability to understand some of the many challenges they face with licensing requirements/regulations and legislative changes. Our licensure database management software provides a targeted approach and solution to all of these challenges. We produce excellent deliverables on-time and within budget.

In addition to mission alignment, Albertson Consulting brings a working knowledge of the business requirements and processes unique to the board's licensing needs. Our licensure database management software has been deployed to state regulatory boards, agencies and departments for over ten years. We have successfully worked with some of the largest associations of retired educators in the U.S. along with doing very specialized work for the National Air Transportation Association (NATA). Our customers, regardless of industry, utilize the same core database and components demonstrating the configurability of our software.

Albertson Consulting possesses over sixty years of cumulative experience in software database architecture, design and development. We specialize in delivering a world-class license management solution that improves business processes, increases efficiency and enhances overall board management.

Our goal is to provide a licensure database software solution that the board will continue to use for the next ten years and beyond like our other customers. Albertson Consulting will provide a world class licensure management database solution at an affordable price that will exceed the board's requirements. If the board selects Albertson Consulting, you will capitalize on our experience, expertise and ability to successfully execute on our deliverables.

## What Makes Us Different

We realize that a handful of other software licensing providers have expressed interest and will likely submit competing proposals to provide a licensure management system. However, we believe that our proven deployment method offers the most configurable, scalable and timely installation to fulfill the West Virginia Board of Medicine's professional licensing needs.



We believe our proposal is unique for several reasons:

- ACI provides over ten years of proven expertise in software licensing and database solutions
- Configurability
- Proven methodology of deployment with similar boards in West Virginia
- A deployment team that understands and possesses extensive experience in similar implementations
- Track record of on-time within budget deployments
- Outstanding customer care team
- An unequaled understanding that one software size does not fit all
- Innovative team of developers along with a quality management team that continues to exceed client expectations
- True 100% **web-based** licensure database management software solution that from conception was designed with the cloud in mind
- Working knowledge of WV State Treasury payment interface

Albertson Consulting is confident that while other respondents may be offering some of the same licensing components, we are proposing a licensing solution that will meet the West Virginia Board of Medicine's current and future needs without additional costs. We are able to do this because of the architectural foundation of our software that allows our customers to easily make changes without having to continually pay for support or enhancement services.

### **In Closing**

The West Virginia Board of Medicine needs a technology partner that not only can meet their required timeline for implementation, but who can also offer a product that instills complete confidence in the board and its staff. We strongly believe that the implementation methodology and robust software solution outlined in this proposal accomplishes both.

This proposal establishes our understanding of the technical requirements of the West Virginia Board of Medicine and how Albertson Consulting (Big Picture™ Software) aligns itself to meet the needs of the board outlined in this RFQ.

It is our sincere desire to have the opportunity to work with the West Virginia Board of Medicine, and we hope that the board can see the many benefits of choosing the Albertson Consulting Big Picture™ Licensing Management Software solution.

If you have any questions regarding the cost proposal, please contact Troy Rauschenberger, Director of Government Markets, at [troy@ebigpicture.com](mailto:troy@ebigpicture.com) or you can call 701-204-6672. Thanks again for allowing Albertson Consulting the opportunity to present our cost proposal. We look forward to speaking with you.

## Understanding of Scope

After reviewing the requirements for the RFQ, it is our understanding that the West Virginia Board of Medicine is looking for off-the-shelf web-based centralized licensure management/database software. The Licensure Management Database & Software Service will provide a unified database for all records, products and content management. The new licensure management software will also have the ability to process online applications and renewals, discipline and regulatory components and online services for license verification and change requests. The board also will require the vendor to host the application for the Licensure Database Management Software.

Board will require a web-site redesign that will integrate online applications, renewals, disciplinary/regulatory components, documents, calendars, news and articles to communicate with constituents. The system will provide functionality to allow end-users/staff the ability to search license verification, along with staff functionality to search, sort, and export any data field within the database. The system will include functionality to print licenses and wallet cards along with certificates as well as the ability to process payments through the WV State Treasurer's Office "E-Gov" system.

The system will also provide a secure cloud-based documentation program interface which will reduce the steps required to perform any actions of the end-user, either the licensee or board staff member. The contract with the vendor will provide software licensing, customization & implementation of the software to meet the board's requirements within this RFQ. The contract with the vendor will also provide a hosted solution and support, training of staff including a redesign of the current website for functionality with the new system.

The contract price will also include the data conversion of current records. Currently the existing database consists of 6,895 allopathic physicians, 112 podiatrists, 784 physician assistants, 487 medical corporations, 98 PLLCs in addition to 807 physician drug dispensing certifications. The current database consists of both active and inactive records, and the board manages approximately 14,000 various licensees and certificates. The board also maintains records of those PAs that hold prescription writing privileges, along with disciplinary actions that have taken place of which some information is available to the public. The proposal deliverables listed below will meet or surpass the board's requirements listed in the RFQ within the quoted price.

## Software Ownership

Albertson Consulting retains all ownership rights to the software and grants a non-exclusive perpetual license for the board to use the software for its intended purpose as long as the annual support agreement fees are paid in full. All other ownership rights remain with Albertson Consulting including the exclusive right to make changes to the source code.

Albertson Consulting typically signs a three-way agreement where if Albertson Consulting for some reason becomes insolvent and declares bankruptcy, our hosting facility service provider will be given the right to step in and support the board in deploying this application on a virtualized environment that is

completely under your control. This is the agreement we have in place for many of our hosted enterprise customers.

## Data Conversion Service

Big Picture will be able to import electronic records that are delivered to our staff. Typically these records are in delimited text files. Often other types of files are delivered to our staff to import into our central repository. In the case where a customer is not capable of delivering their records, our staff may be able to pull the records out of the existing internal database system if it has ODBC connectivity or data dump capabilities that render textual files.

## Implementation Costs & Terms

Albertson Consulting, Inc. (ACI) proposes to license one copy of the Big Picture™ Software for use by the West Virginia Board of Medicine. ACI retains the rights to the software. The Board cannot sell, give, maintain or distribute the software in any way to any other entity. The Board retains ownership of all data related to the project.

ACI retains all ownership rights to the software and grants a non-exclusive, perpetual license for the Board to use the software for its intended purpose as long as the annual support agreement fees are paid in full. All other ownership rights remain with Albertson Consulting, Inc. including the exclusive right to make changes to the source code.

Annual License/Support Plan: Includes, software version updates, system maintenance and support including up to 5 non-accumulating hours of development, assistance or issue resolution billable annually. Annual License/Support Plan fees apply no matter where the system is deployed.

Albertson Consulting Inc. prefers to enter into a multi-year contract and recognizes and agrees that all maintenance, enhancements and support beyond the Annual License/Support Plan will be billed at \$100.00 per hour commencing upon execution of the contract.

## 3. Response to RFQ General Requirements

### 3.1.1 Website Redesign and Functionality Integration

Albertson Consulting Inc. will work with the board to develop an integrated website which will allow for online applications, renewals, accreditation tracking, disciplinary/regulatory along with online services for licensees to verify, change and update license information.

#### 3.1.1.1 Big Picture™ Licensure Verification Module

The Licensure Verification Module allows visitors to the public website to get real-time verification of certifications and licenses that the Board has in the database. If the

individual has disciplinary documents available in a public discipline folder in the integrated document repository, they can be made available if the board desires.

#### 3.1.1.2, 3.1.1.3, 3.1.1.4

#### **Big Picture™ Applications Option**

Our Online Application Module allows administrators to receive and process applications for licensure for all license classes through the State regulatory board website. The process begins with an applicant selecting the class of license they are applying for. The following application screen provides some verbiage describing the process and the requirements to complete the process. Then they are prompted to enter some verifiable pieces of information such as name, address, social security number and/or birth date. The applicant is then presented with various questions about their submission, followed by a payment processing screen.

After payment is authorized, a customer receipt and number is generated which can be printed by the applicant. Once the submitted data is reviewed and processed, the applicant is inserted into the licensee database automatically and any documentation that arrived with the application such as transcripts along with a PDF of the application can be automatically pushed/uploaded to the integrated online document repository. Data can be organized in a chronological sequence or order based on user settings.

Application status for applicants is also available with licensing of this option. This software runs off of the integrated database and the relevant Status fields in the database.

#### **Big Picture™ Renewals Option**

Our Online Renewals Option Module is very similar to the applications option but allows administrators to receive and process renewal requests through the front end website. Just like applications, a robust structure already exists and both utilize the revenue collection system previously mentioned.

Applications and Renewals Options both utilize a payment gateway to finalize the transaction. We have integrated our software to various payment gateways including the WV State Treasurer's Office "E-Gov" payment gateway. Licensees have the ability to check license status through the website with both the application and renewal process and can also update information such as name, address, etc. online via the board's website. Licensee can also upload any supporting documents, certifications, continuing education at time of application or renewal. All data uploaded is synched with the central database real-time at the point of submission from the web portal.

### 3.1.1.5 Software Interfaces

Applications and Renewal interfaces to National Associations or Federations are also integrated within the software's existing capabilities.

### 3.1.2 Content Management Database System

The Licensure Management Database Module allows state entities to manage all license types and corresponding information in a real-time secure online environment. The web-based database is available from any Internet connected PC, allowing immediate access to licensee information anytime, anywhere.

#### 3.1.2.1 Centralized Database

All data is stored in a centralized database repository for easy access and search requests.

##### 3.1.2.1 Integrated Document Management/ Repository

- Manage documents
- Email integration lets you work within Outlook
- Renewal/Application integration – automatically store documents and images such as disciplinary tracking, malpractice etc., in central database repository
- Public folder for verifications – As public discipline documents become available they can be shared and accessible to the web-based employer verification software
- Edit merged templates and save them back to the repository or print them for the entire queue
- Tracking of all licensee related practice privileges for Licensure is available in the base system

##### 3.1.2.3 Internal Reminder System

- Setup and view recurring reminders at a licensee level
- Awaiting updates – easily commit all website or renewal updates right to the database
- Discipline and compliance monitoring alerts and reminders

##### 3.1.2.4 Contact History

- Record transactional contact history by contact type and contact individual for respective licensee
- Email integration correspondence tracking
- Track phone conversations, meetings, webinars, board meetings, hearings, etc.
- E-blast integration – All emails from an e-blast can be recorded in the contact history of each licensee for future reference

### 3.1.2.5 Portal integration and reporting

The following views are available to system users.

- Tasks – upcoming and past due
- Upcoming reminders
- New documents added to document repository
- Recent contacts – Pulled from contact history
- Disciplinary type breakdown widget
- Security, permissions and access controls set at user level
- Recent test results widget
- More widgets available out of the box and anything in the system can be summarized or customized to meet your needs either by the system users or by developers.

### 3.1.2.6, 3.1.2.7 Integrated discipline/Case administration

Administrators can setup and manage any field, any View and any Tab for them to appear on. This is fundamental to our Discipline/Case Management software.

During implementation, it will be configured to meet your needs. It facilitates storage of the following records in the database:

- Drug/Alcohol test results tracking
- Workplace impairment tracking
- No limit on number of complaints allowed in system
- Upload video
- Reminders recurrence
- Discipline tracking
- Public/Private document retention
- Any other document types such as dockets, cases, complaints, and any other record type can be configured in the system and stored

### 3.1.2.8 Continuing Education & Accreditation Tracking

Provides the ability to create, view, search, list or maintain courses and classes. Imports and exports are available to allow licenses or authorized system users to upload rosters for continuing education courses. Requirements for CEs will be set-up per the board's advisement.

### 3.1.2.9 License Printing

Software has the capabilities to print licenses, wallet cards, reports, correspondence, envelopes and other miscellaneous items that need to be printed as part of the licensure cycle.

### 3.1.2.10 History view

- Logging and tracking of updates to all data history with date and time stamp
- Administrative panel allows many views to be setup for different fields/record types
- Every licensee has a full audit of every change that was made to the record since the inception of database

### 3.1.2.11 User Content Management

- Portals, Widgets, Reports, and correspondence templates are all editable by system users in our administrative site
- Custom report building / editing tool allows staff to build and publish reports from license and application data
- Record types can be related to other record types in any manner and with all related field are completely editable
- Staff will have the ability to manage user defined fields in the database. These fields or multiple fields can be used to generate queries for reports/exports and create custom templates for later use
- Administrative site allows complete control over front end user screens.
- All fields, record types, codes, products, templates, in the database are manageable
- Exports can be of the entire data set, or data and the fields that were queried can then be rearranged to fit the necessary needs
- Commonly used export templates may be saved for later use

### 3.1.2.12 Search Panel

License Management Database Module is critical to all data mining searches and reporting related operations in the system. Queries can be accomplished right from within the software. **Every field** for any **record type** can be utilized as **search criteria**. After a search has been completed, it can be **saved** for later use. It then shows up in the search drop down and on the **Portal** screen where a user can access it with one click.

### 3.1.2.13 Data Mining

All data pertaining to a licensee are stored within the centralized database and available to generate custom reports, queries or searches. Every field within the database is searchable, sortable or exportable.

### 3.1.2.14 Inspections

The Big Picture Inspection Module gives the board the ability to collect inspections from field representatives in real-time. It is a very flexible solution that can be customized to meet the demands of your business. It facilitates multiple collectors gathering information into the central repository. These collections can come while in the field or any time your business process requires. The module will lower your overall cost of inspection management and protect the public by increasing the accuracy and timeliness of information.

Collections are tightly integrated into the Big Picture Database. Depending on your business process, once these collections arrive in the repository they establish a historical record that can be printed and reported on. All inspection data is searchable, sortable and exportable. Inspection data in detail or in a summarized fashion is available in the Big Picture Portal for managers, staff or inspectors depending on security group.

After the inspection system is deployed you are left with full management capabilities in our system administration software to modify inspections and collections. Questions, answers, fields, field types and responses are manageable. Also using our standard web based editing software administrators can [configure inspection templates](#) easily without the need for any programming. Our software can be configured to collect any data for any entity anywhere an internet connection exists. All collections occur over SSL to ensure secure inspection collections.

Our inspection software can set-up business process, [workflow](#), portal widgets and security for inspectors, training, testing and deployment to the internet-enabled collection devices of your choosing. Our standard collection devices are Windows based laptops and tablets and Android based laptops, tablets and phones.

#### **3.1.2.15 Audit Trail/History View**

- Logging and tracking of updates to all data history with date and time stamp.
- Administrative panel allows many views to be setup for different Fields/Record types.
- Every licensee has a full audit of every change that was made to the record since inception of database

#### **3.1.2.16 Workflow Management – TASKS**

- Every record type can contain Tasks. These tasks are editable in the Administrative area. They then show up for every record entered in the system. A Due Date is entered for each task in the Checklist/Workflow.
- Once that task has been completed it another date is entered. The tasks that are outstanding pop up when you access this licensee's record. Also there widgets that can be configured in the portal interface to ensure that all upcoming and past due tasks are attended.
- Tasks are editable by the administrative team/staff for each record type. This workflow engine is utilized with Inspections, Discipline and Application Processing to ensure that all tasks associated with these items are successfully managed.
- Records can be added ad-hoc to a specific record.
- All tasks can be customized and managed by board staff based on permissions and job roles etc.

#### **3.1.2.17 Integrated batch administration/revenue collection software**

- Batch administration allows system users to manage revenue collection. This software specializes in cohesively managing revenue collected manually and online from online applications or renewals.
- It facilitates a quick fetch of all licensees to streamline creation of a Batch with or without the use of bar coded renewal requests.
- Software interfaces for reconciliation with state treasury department(s) and other designated state collection agencies.



- It is the center for revenue related business process which occurs automatically when a payment is posted to a license account.

### 3.1.3 Administrative Interface

#### 3.1.3.1 Administrative Interface

The Administrative Package is the tool that puts the management system in your hands.

Allows internal user to upload video, photos or other media related items

- Send out surveys or questionnaires to entire database contacts or targeted group of individuals
- Internal notification system for reminders of calendar events, past due notices, letters, disciplinary action follow-up etc.
- Manage events, articles, publications, custom letters, and calendars through the administrative interface.
- Manage all website content

#### E-blast Option

- Our e-blast tool allows administrators the ability to send out high quality professional looking email messages. The recipient lists can be created in the database by any search criteria and stored as saved searches or saved queues, either of which can be accessed by the E-blast tool.
- Messages can contain user selectable fields merged from the database so system users can personalize the messages. The rich text editor allows users the ability to change fonts, styles and other popular attributes. Messages can also have attachments. After a message is ready, it can be previewed, and if the user selects to have this recorded as a contact in the database, the information will show up under this person's record in the Contact History.

### 3.1.4 Cloud-Based Documentation Program

#### 3.1.4.1 – 3.1.4.6 Big Picture CloudDocs

Big Picture Software provides a cloud-based document software program which is part of unified database used for the licensing management system. Board members have the ability to access up to the minute documents in a secure online environment. Board members can upload PDF & word documents to folders, set-up auto email notifications to board members. Documents can be viewed in a browser environment and can be accessed on the internet with email and a password.

Board members can also manage hierarchies of folders & documents stored in the same unified database document repository. The easy note taking annotations feature of our CloudDoc's™ Software allows permitted users to easy access to safely store notes, questions and comments in the Cloud. Add

annotations to text or images, tag notes within keywords and view notes outside of documents. Board members can organize notes with tags and descriptions, highlight, strikethrough and insert annotations in a real-time cloud based environment. All confidential documents are stored via encrypted connections. Ability to search and access annotations from outside the document which do not reside on the local laptop or machine.

## 4. Performance

### 4.1.1 – 4.1.6 Installation & Implementation

Albertson Consulting Inc. will meet with the board and staff upon award of contract. Vendor & Board staff will determine roles in relation to board liaison and establish milestones for implementation to meet the boards 150 calendar day implementation. Meeting will also cover a data conversion plan and any system customization or implementation request outside of original scope in RFQ.

After scope of work has been established there will be a schedule provided within (10) calendar days of award. Schedule will contain all phases of deployment & implementation of software, meetings and discuss website integration and any issues (if any) that may occur during the transition to the new system.

Board will use Albertson Consulting Inc., proven data migration process. A plan will be developed for the board and what file formats etc., will be needed for the migration/ data conversion. Board will deliver the data they want loaded in the proper requested format, a file of any erroneous data that was not able to be imported will need to be properly formatted/corrected prior to additional import attempts. In our administration area an import tool exists that can be utilized by internal IT staff to load, test, and complete imports.

**DOCUMENTATION:** Instructional manuals will be provided for the board and staff for internal reference and training purposes. The manual will be in an electronic format and may be reproduced by the board for internal purposes.

**TRAINING:** Training will be conducted for all staff members currently (14) on the new software/database system. Method of training meaning either on-site or via webcasts will be determined at kick-off meeting. On-going training of board staff will be conducted as new staff is added.

## 4.2 Acceptance

### System Testing

The goal of System Acceptance Testing is to ensure that the software is functioning properly and meets the requirements within the RFQ & scope of work prepared prior to implementation. During the testing board staff will be able use the new system for their applied job roles to ensure that system meets the board's business requirements.

## 4.3 Maintenance & Support

### Support/Maintenance

Upon completion of implementation and the software has successfully been deployed, the board will receive ongoing support & maintenance for the life of the contract. An allotted number of support hours will be included within the Annual Support & Maintenance agreement. Board may elect to increase the number of hours of support at any time during the contract term. Our goal is to keep our customers satisfied while provided a world class level of support. It is required that a support/maintenance agreement be paid to utilize the software.

### 4.3.1 User Help Desk

#### 4.3.1.1 – 4.3.1.3 Customer Support/Help Desk

Albertson Consulting Inc., will provided 24/7 support for the board & staff members. A dedicated Project Manager & Customer Service Representative will be assigned to assist with initial implementation and ongoing support. Desktop support will also be available as a method if required to resolve technical issues or end user support.

### 4.3.2 Software Patches & New Releases

#### 4.3.2.1, 4.3.3.2, 4.3.3.3 Software Updates

In either type of deployment hosted or deployed state side our project managers will work with your IT people to understand what updates are available and how to best apply them to your system. Then our support staff will perform the updates according to your schedules.

Software updates are included in the annual support and maintenance agreement. Software updates are installed by our support technicians as part of our annual support agreement. Typically we demonstrate the available upgrades annually or semi-annually and then you pick which upgrades you would like and we install the

### 4.3.3. Customization of the System

#### 4.3.3.1 – 4.3.3.5 Configuring & Custom Development

One feature that sets Big Picture Software apart from other software vendors is the configurability of our software. Most if not all business process can be configured to meet the board's specific requirements, without affecting the base code of the software. All Big Picture Software modifications/configurations are managed through the Administrative Portal. Administrators can setup and maintain a number of custom enhancements to their system. If additional enhancements are necessary the system is capable of being extended per your board's needs.

### 4.3.4 Hosting Services

#### 4.3.4.1 – 4.3.4.3 Free Hosting

Big Picture Software will host your solution on our servers or no additional charge. Big Picture's annual support/maintenance plan includes hosting your software application and database in our world class hosting facility. We have a 99.9% uptime so you can be confident that Big Picture Software is online and ready to assist your agency 24 hours a day, 7 days a week, and 365 days a year. Our servers are housed in a carrier class data center, where security is of the utmost importance, authorized-only access to the hardware and software is required.

## Exhibit A Pricing Page

Response to RFQ#BOM140018

(See Attachment A Exhibit Page (Excel spreadsheet with pricing))

## RFQ#BOM140018

### Exhibit A Pricing Page

#### Contract Item

Item #	Item	Vendor Description	Unit of Measure	QTY	Cost	Ref
1	Concurrent User License(s) for Fourteen (14) WV Board of Medicine Users Licensure/Records Product with Content Management Database System (including website, administrative interface and cloud-based program for up to 14000 various licenses and certificates	Our pricing model is not based on the # (number) of internal users/board members or staff members or seats, so this does not apply to our pricing model. We are bidding a one-time LS (Lump Sum) for (Item# 1) which is for the initial Big Picture License. Including website, administrative interface program and database program for approximately 15,000 various licenses and certificates currently residing in the existing WV Medical Board's (database)	LS	1	\$20,000	A

#### Contract Services

Item #	Item	Vendor Description	Unit of Measure	QTY	Cost	Ref
2	Implementation and Installation to Acceptance	Cost is for a LS (Lump Sum) payment for professional services for implementation & stand-up of the system, including implementation of cloud-based program. Importing of records/data, board staff training, (1) onsite visit and all other requirements set-fourth in the RFQ to meet the boards requirements.	LS	1	\$35,000	B
3	First Year Support/Warranty	The cost reflects our 1st annual licensing/support/cloud-docs/maintenance agreement, hosting is provided "Free" as part of our annual service agreement. Includes five (5) support hours. Assigned hours can be used for development or general system support.	YR	1	\$15,000	C
4	Second Year Support/Warranty	The cost reflects our 2nd year annual licensing/support/cloud-docs/maintenance agreement, hosting is provided "Free" as part of our annual service agreement.. Includes five (5) support hours. Assigned hours can be used for development or general system support.	YR	1	\$15,000	D
5	Third Year Support/Warranty	The cost reflects our 3rd year annual licensing/support/cloud-docs/maintenance agreement, hosting is offered "Free" as part of our annual service agreement. Includes five (5) support hours. Assigned hours can be used for development or general system support.	YR	1	\$15,000	E

#### Unit Prices

Item #	Item	Vendor Description	Unit of Measure	QTY	Cost	Ref
Unit prices are to be provided for the following two (2) Items, and will only be used to execute formal Change Orders during the life of the contract, if required. Estimated are included for bid evaluation only, there is no guarantee that any quantity of the Item(s) will be purchased						
6	Additional License, Per User	Our pricing model is not structured on a per user, seat or user license. The board will be allowed to bring on as many staff members or user's as they need to meet their internal needs.	EA	1	\$0	F
7	Additional Professional Service Support Hours	Unit Price per Hour= \$100 (x 8 hours = Cost)	HR	8	\$800	G
<b>TOTAL BID (A + B+ C + D + E + F + G) =</b>					<b>\$100,800</b>	