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Header 9

List View

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 837124

SO Doc Code: CRFQ

Procurement Type: Central Master Agreement

SO Dept: 0506

Vendor ID: 000000163944

SO Doc ID: EHP2100000002

Legal Name: FIRST CHOICE SERVICES INC

Published Date: 3/1/21

Alias/DBA:

Close Date: 3/16/21

Total Bid: \$534.05

Close Time: 13:30

Response Date: 03/15/2021

Status: Closed

Response Time: 15:46

Solicitation Description: TOBACCO CESSATION QUITLINE

Responded By User ID: Davidcpawv1975

Total of Header Attachments: 9

First Name: David

Total of All Attachments: 9

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**State of West Virginia
 Solicitation Response**

Proc Folder: 837124
Solicitation Description: TOBACCO CESSATION QUITLINE
Proc Type: Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2021-03-16 13:30	SR 0506 ESR03022100000005988	1

VENDOR
 000000163944
 FIRST CHOICE SERVICES INC

Solicitation Number: CRFQ 0506 EHP2100000002
Total Bid: 534.0499999999999545252649113 **Response Date:** 2021-03-15 **Response Time:** 15:46:32
Comments:

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

Vendor Signature X **FEIN#** **DATE**

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Intake/Eligibility Verification				44.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments:

Extended Description:

Section 4.1.2 Intake eligibility verification

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Coaching Call #1				23.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments:

Extended Description:

Section 4.1.4.1 Coaching call #1

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Coaching Call #2				22.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments:

Extended Description:

Section 4.1.4.1 Coaching call #2

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Coaching Call #3				22.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments:

Extended Description:

Section 4.1.4.1 Coaching call #3

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Coaching Call #4				22.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments:

Extended Description:

Section 4.1.4.1 Coaching call #4

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Reactive Calls #1-4				2.25

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments:

Extended Description:

Section 4.1.4.2 Reactive calls #1-4

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
7	Nicotine Gum 4mg-24 Pieces per day				58.80

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 100 pieces of gum. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.1 Nicotine Gum 4mg 24 pieces per day

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
8	Nicotine Gum 2mg-24 Pieces per day				58.80

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 100 pieces of gum. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.1 Nicotine Gum 2mg 24 pieces per day

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
9	Nicotine Patch 21mg-1 patch per day				51.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 14 patches. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.2 Nicotine patch 21 mg 1 patch per day

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
10	Nicotine Patch 14mg-1 patch per day				51.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 14 patches. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.2 Nicotine patch 14 mg 1 patch per day

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
11	Nicotine Patch 7mg-1 patch per day				51.00

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 14 patches. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.2 Nicotine patch 7 mg 1 patch per day

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
12	Nicotine Lozenge 4mg-20 lozenges per day				64.10

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 81 lozenges. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.3 Nicotine Lozenge 4mg-20 lozenges per day

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
13	Nicotine Lozenge 2mg-20 lozenges per day				64.10

Comm Code	Manufacturer	Specification	Model #
81111508			

Commodity Line Comments: This is a monthly costs which will include two shipments of two week supplies which each contain 81 lozenges. Price is based on GSK contract for reimbursement costs only.

Extended Description:

Section 4.6.1.4.3 Nicotine Lozenge 2mg-20 lozenges per day

3. Qualifications:

First Choice Services, Inc., a West Virginia based non-profit, is pleased to submit a proposal in answer to the Tobacco Quitline Request for Quotations (RFQ). First Choice Services, Inc., (FCS) was established by First Choice Health Systems, Inc. (FCHS) in 2008. FCS is a non-profit 501(c)3 whose Board of Directors includes these organizations: Pretera Center, Westbrook Health Services, Healthways Inc., Potomac Highlands Guild, Valley HealthCare, and the Alliance for Children.

FCS has been proud to operate the Tobacco Quitline Program for the state of West Virginia since 2017. In the years since the contract was originally awarded to FCS, the WV Tobacco Quitline has fielded over 40,000 calls, enrolled over 21,000 participants and completed over 36,000 coaching calls. In addition, under FCS, the WV Tobacco Quitline has forged several critical partnerships with regional organizations whose goals of eliminating tobacco dependence align closely with those of the Quitline. Among others, the WV Tobacco Quitline has collaborated with the WV Perinatal Partnership, the WV Collegiate Recovery Network, the American Lung Association and the Coalition for a Tobacco Free WV. The FCS Tobacco Quitline has lent its support to programs such as Baby and Me Tobacco Free, and worked with health care stakeholders to interpret and implement relevant legislation such as House Bill 2525 Pharmacy Bill.

The Quitline attributes its success in serving so many West Virginians to the information and referral infrastructure of FCS, the experience of FCS leadership, Quitline coaches and program staff, and the strong partnerships the agency has developed and maintained throughout the state. FCS plans to maintain and build upon this success if awarded the Tobacco Quitline Contract in 2021.

Established with the purpose of broadening the array of community services and ensuring efficient access to behavioral health treatment and health care for vulnerable and at-risk individuals and families, FCS has a track record of successfully managing grant-funded programs including multiple helplines, data/evaluation programs for other agencies, and several ACA marketplace navigator programs. The full FCS program array is detailed below:

The Problem Gamblers Help Network of West Virginia (2000 through present)

The Problem Gamblers Help Network of West Virginia (1-800-GAMBLER) includes a 24/7 phone, text and chat support including referral to gambling addiction specialists, educational mailings, follow-up calls, counselor-led support groups, support for family interventions, and intense weekend retreats. This program also features a strong outreach and marketing component, including a paid media plan, earned media, social media, as well as trainings and exhibits throughout the state. PGHN Helpline Coordinators also answer the chats, texts and calls that originate from the National Problem Gambling Helpline number for West Virginia callers. FCS has served more than 14,000 West Virginians through this program.

Help4WV (2015 through present)

1-844-HELP4WV is a 24/7 resource and referral center designed to streamline the process of accessing help for substance abuse and behavioral health issues. It includes call, text and chat access points. Upon reaching out, HELP4WV consumers are connected to community-based

treatment programs and behavioral health services near them by live FCS Helpline Specialists. Follow-up is a major component of the program as all consenting consumers receive up to three follow up calls to assess for unmet needs. The program features an online public database, created and maintained by FCS, of more than 1,000 community resources. FCHS/FCS answers over 10,000 calls per year from West Virginians seeking assistance through this program.

West Virginia Navigator (2015 through present)

This program offers free health insurance counseling and guided navigation of and enrollment in the Health Care Marketplace and Medicaid funded through the Centers for Medicare and Medicaid Services (CMS).

First Choice Services Peer Recovery Coaching (2016 through present)

FCS operates a grant funded program that includes four full time Peer Recovery Coaches situated throughout the state. FCS Peer Recovery Coaches have full PRSS certification and offer individual support for those seeking a pathway to recovery. FCS Peer Recovery Coaches are additionally available to FCS consumers across various programs who identify a need for peer support.

PA Get Help Now (2016 through present)

Pennsylvania Get Help Now, is a 24/7 resource and referral center designed to streamline the process of seeking help for substance abuse and behavioral health issues for Pennsylvania residents. FCHS/FCS answers over 17,000 calls per year from Pennsylvanians seeking assistance through this program.

WV Tobacco Quitline (2017 through present)

The WV Tobacco Quitline is a complete tobacco cessation helpline. Helpline agents enroll eligible consumers into the program, assist them in accessing free cessation products, and refer them to Quitline coaches, counseling, and nicotine replacement therapy. FCS provides outreach for the program at health fairs and professional conferences statewide. The FCS media and marketing team additionally manage social media for this program. FCS answers over 11,000 calls per year from West Virginians seeking assistance through this program.

Potomac Highlands Guild Crisisline (2017 through present)

FCS was awarded a contract to answer the after-hours crisis line for the Potomac Highlands Guild, a comprehensive mental health center in WV. Since 2017, FCS Helpline Specialists have provided support via this line, assisting in access to mental hygiene proceedings, providing de-escalation support and offering information and referral.

National Suicide Prevention Lifeline (2017 through present)

FCS answers the National Suicide Lifeline for the state of West Virginia. The program provides 24/7 crisis intervention for callers who are at risk for suicide attempts, including initiating emergency services if necessary. FCS Helpline Specialists answer over 2500 calls per year from West Virginians seeking assistance through this program.

Virginia Problem Gambling Helpline (2017 through present)

FCS answers the calls, texts and chats for problem gamblers and their loved ones in the state of Virginia. This program includes a 24/7 helpline, with educational mailings, follow-up calls, and referral to treatment providers. FCHS/FCS answers over 6,000 calls per year from Virginians seeking assistance through this program.

Montana, Iowa and New Hampshire Navigator (2019 through present)

FCS added three more states to those served with ACA Navigation services in 2019. As with WV Navigator, each program offers state residents free health insurance counseling and guided navigation of and enrollment in the Health Care Marketplace and Medicaid funded through the Centers for Medicare and Medicaid Services (CMS).

Help4WV Child's Crisis Line (2020 through present)

In 2020 the FCS Help4WV program was proud to add information and referral services by call, text or chat, to children and families experiencing behavioral crisis. The expanded array of services features crisis de-escalation and warmline referral to regional Mobile Crisis Response Teams as well as a peer warmline for those experiencing emotional distress.

Help-304 (2020 through present)

1-877-Help-304 is a 24/7 program offering emotionally distressed consumers of all ages access to live Crisis Counselors by call, text or chat. The program additionally operates several virtual support groups to consumers facing undue stress related to the Covid-19 pandemic.

First Choice Services Chief Executive Officer, Lata Menon, will provide general program oversight to the Tobacco Quitline. Lata holds a Masters Degree in Social Work and a Masters Degree in Public Administration from West Virginia University and is a licensed graduate level social worker. Ms. Menon has more than 25 years of experience working with at risk populations and more than 15 years of experience in executive leadership.

3.1 Quitline Coaches - FCS currently employs two certified Tobacco Cessation Coaches with 24 years of combined experience working in tobacco cessation. In addition to providing all levels of coaching calls and support to TQL consumers, FCS Tobacco Quitline coaches assist in onboarding and training the new staff and are able to mentor new Quitline coaches when necessary. These individuals have received extensive training in motivational interviewing and the Transtheoretical Model of Change. Additionally, they have been trained in HIPAA compliance, Applied Suicide Intervention Skills Training (ASIST), Mental Health First Aid, person centered care, cultural competency, trauma-informed care and customer service. The individual qualifications of the Tobacco Quitline coaches are listed below and their resumes are attached. All Tobacco Quitline staff must be tobacco and drug free.

Jayne Kinney, Quitline Coach

Jayne Kinney has 11 years of experience working in the field of tobacco cessation, seven of which have been in tobacco quit coaching, and two of which were in program management for a previous contract provider for WV Tobacco Quitline services. Ms. Kinney additionally holds a Bachelor of Arts in Criminal Justice/Legal Studies. In addition to being a certified Tobacco

Treatment Specialist, Ms. Kinney is certified in Freedom From Smoking and has a National Certificate in Tobacco Treatment Practice.

Ashley Kirk, Quitline Coach

Ashley Kirk has 13 years of experience working in the field of corporate health and wellness, 12 of which have been in health and wellness coaching, and two of which were in program management for a previous contract provider for WV Tobacco Quitline services. Ms. Kirk holds a Bachelor of Science in Nutrition and Dietetics from Kent State University and has been a certified Tobacco Treatment Specialist since 2012.

3.2 Quitline Program Director

If awarded the contract, the WV Tobacco Quitline will continue under the leadership of Program Director, Lindsay Hatfield. Ms. Hatfield has over four years of experience in Tobacco cessation work, and has been in her role as Quitline Program Director for two years. Ms. Hatfield brings 15 years of management experience as well as a Bachelors in Marketing and Management to the Tobacco Quitline. Additionally, Ms. Hatfield has extensive experience in pharmacy management and billing and is certified in Applied Suicide Intervention Skills Training and HIPAA Privacy and Security. In addition to serving as the Quitline Program Director, Ms. Hatfield directly supervises more than 20 FCS employees. She coordinates training and scheduling of Quitline program staff, manages program issues as needed and specializes iCarol data analysis supporting the grant reporting needs of several FCS programs. Ms. Hatfield's resume is attached.

3.3 Clinical Director

Dr. Normal Montalto, D.O. Dr. is licensed to practice medicine in the State of West Virginia and is a recognized expert in the field of tobacco cessation. Additionally, he is certified by the American Board of Family Practice and the American Osteopathic Board of Family Physicians. Dr. Montalto has provided clinical services to WV's Tobacco Quitline for nearly 15 years and has been the contracted Clinical/Medical Director for the Tobacco Quitline under the leadership of First Choice Services since 2017.

3.4 NAQC Membership – FCS is currently a member of the North American Quitline Consortium and will continue to be a member as long as FCS has the contract for the Tobacco Cessation Quitline. FCS will also provide individual memberships for the Division of Tobacco Prevention to the WV Tobacco Quitline Program Manager, the Quitline Evaluator, and the representative from the Bureau for Medical Services.

4. MANDATORY REQUIREMENTS

4.1 Mandatory Contract Services Requirements and Deliverables

4.1.1 Division of Tobacco Prevention Requirements

4.1.1.1 Quitline Implementation – FCS has successfully been the vendor for the Tobacco Cessation Quitline since July 2017 and will continue to perform services as implemented. FCS will also continue to provide eligibility verification, educational quit materials, non-prescription medications, and text and web-based cessation counseling support to participants.

4.1.1.2 Eligibility Verification – FCS will ensure that only callers who cannot access tobacco cessation through other resources will receive services covered by Bureau for Public Health (BPH) funds.

This will be accomplished by screening each caller to determine if they might be eligible for tobacco cessation services through other resources such as a health plan or their employer.

All callers who are deemed eligible for cessation services through the Division of Tobacco Prevention will be screened using the Minimum Data Set Questions developed by the North American Quitline Consortium as well as any screens that are indicated for special populations. The responses to the MDS screening will be recorded and stored in iCarol, a cloud-based helpline data management system utilized by FCS. Via iCarol, FCS has the ability to query the responses to both initial and follow-up screening questions for the purposes of evaluation. Designated staff of BPH and DTP will be provided with logins for iCarol so that they may also review records and query the information in the database.

4.1.1.3 Materials – In conjunction with BPH and DTP, FCS will provide culturally and linguistically appropriate materials to be distributed to Quitline callers. The materials will include brochures and leaflets and will be specific to the method of use (smoking, smokeless tobacco, electronic cigarettes) as well as specific populations (men, women, pregnant women, teens, ethnic groups, LGBTQ, etc.)

4.1.1.4 Phone-Based Counseling – FCS will provide comprehensive proactive and reactive phone-based behavioral counseling services to eligible Quitline callers. Counseling will include the creation of a quit plan which will include the following elements:

1. Assisting callers in selecting a quit date.
2. Educating callers about how to inform friends and family of their decision to quit.
3. Asking callers to identify smoking reminders and how they will remove those reminders.
4. Asking callers to identify triggers.
5. Assisting callers in developing coping strategies.
6. Sharing resources with callers that they can use for immediate help, including texting with the FCS Quitline coaches.
7. Assisting callers in identifying rewards for each milestone.

Proactive Phone Calls – FCS Quitline Coaches will contact enrolled participants every two weeks for a total of four proactive calls. Reminders for these proactive calls will be set in the caller's record in iCarol, the cloud-based helpline data management system utilized by FCS. The Quitline Coach will ask each caller the intake and follow-up questions identified on Attachment 2– Quitline Coaching Call Requirements. The answers to these questions will be recorded and stored in iCarol with the ability to query the responses of both the intake and follow-up questions for the purposes of evaluation.

Reactive Phone Calls – FCS Quitline Coaches will respond to up to four reactive coaching calls within 12 months from the date of participant enrollment. Participants may contact the coach for any of the following reasons:

1. Relapse prevention
2. Dealing with cravings
3. Coping with stress and anxiety
4. Dealing with grief and/or loss or other life events that would trigger relapse
5. Other supports

Web-based and Text Support Counseling – Participants will be given the option to receive email, text, and/or video conference, based coaching through Microsoft Teams and iCarol platforms. FCS will provide email and web-based coaching options, with the ability to provide video counseling, if desired, through Microsoft Teams platform. Video coaching is available to the caller so long as they have a device with an attached or built-in web camera. iCarol is a full capacity helpline software management system that automates all of the processes associated with managing helplines. FCS Quitline coaches will utilize an application within iCarol to text with the participants in order to provide text-based coaching services and reminders.

Special Populations – FCS commits to responding to the needs of special at-risk populations such as pregnant women and will provide services that are required by the Division of Tobacco Prevention (DTP) and the Office of Maternal Child and Family Health. FCS will work with the DTP to identify other special populations who may need additional assistance with tobacco cessation.

4.1.1.5 Nicotine Replacement Therapy – FCS will negotiate a contract with a supplier of nicotine replacement therapy (NRT) in order to have patches, gum, and lozenges shipped directly to participants who are eligible to receive NRT through the Quitline program.

4.1.2 NRT for BPH – FCS will authorize four two-week supplies to be directly shipped from the contracted supplier to all eligible participants who agree to more than one coaching interaction through call, video conference, email, or text. FCS will follow direction from the Bureau of Public Health (BPH) as to the need for dual therapy and amounts to be shipped to each caller.

4.1.3 For Medicaid

4.1.3.1 Contact – For eligible Medicaid recipients, FCS will contact Rational Drug Therapy, the authorizing body for Medicaid, to approve the participant’s prescription for NRT. This contact will be made through the HIPAA compliant cloud-based faxing system described in Section 4.1.3.2.

4.1.3.2 Fax Referral System and Electronic Health Records – FCS will use a HIPAA secure cloud-based faxing system to allow all West Virginia health care professionals, medical offices, dental offices, behavioral health care providers, or community organizations to fax referrals to the Quitline. The cloud-based faxing system selected utilizes industry-leading data protection

and security combined with full 256-bit SSL encryption and all Public Health Information (PHI) is stored in redundant SSAE16/SAS70 Type II certified data centers. The system will allow Quitline administrators and staff to organize, manage, and send unlimited faxes from any internet connection.

4.1.3.3 – Electronic Communication - FCS will provide and maintain an easily accessible and usable website that allows participants to request enrollment for Quitline services. The website will include phone, text, chat, and email options to access coaching for Quitline services. FCS has a marketing and media director on staff dedicated to maintaining social media presence and promoting the Quitline. The Director will assure all posting is approved by the DTP before public viewing. FCS currently maintains four websites and six social media pages for our other helpline programs.

4.1.3.4 – Reporting Requirements and Designated Contact - FCS will provide progress reports as outlined in the reporting requirements. Lindsay Hatfield, Quitline Program Manager, will be the designated liaison to respond quickly, within a two-hour response time. She will address any problem/issues that may occur during a regular business day. This includes but is not limited to, questions about enrollment, NRT shipments, or other situations that may occur.

4.1.4 Vendor Capacity

4.1.4.1 Vendor Qualifications - FCS has qualified employees as identified in Section 3. FCS has in place a fully functioning call center, and all necessary equipment to answer and manage the Quitline and all of its provided services. FCS has successfully managed several state and federal grant-funded programs including multiple helplines and data and evaluation of other statewide programs as well as the Tobacco Cessation Quitline.

4.1.4.2 Call Tracking and Reporting – FCS will utilize iCarol as the computerized tracking system for Quitline activity. The system is able to provide accurate information on individual calls, as well as provide reports. FCS staff are fully trained to enter all caller information. iCarol collects customized fields that can track services provided, caller demographics and any other variables needed including caller referrals.

4.1.4.3 Data Access – FCS will provide complete access to all Tobacco Cessation Quitline data stored on the iCarol database to designated staff at BPH, DTP, BMS, OMCFH as well as the contracted external evaluator. Since iCarol is a cloud-based system, FCS can create a user profile for designated staff at the above listed agencies who require access to the information. FCS utilizes ShoreTel, an IP PBX system, for the management of phones for all of our helplines. FCS utilizes the reporting features in the ShoreTel management system to collect data on performance measures such as caller wait times, volume of calls received, volume of calls when a coach is not available, and abandoned calls. Currently, FCS is working on switching to Ring Central which will replace ShoreTel and be able to provide better reporting data related to calls.

4.1.4.4 Quitline Staff Training – FCS will assure complete training to all Quitline staff and coaches. Staff will be provided ongoing training to maintain understanding and comprehension of industry standards. Staff will be trained internally and externally and receive education

resources to accommodate trainings. All staff will be trained at least quarterly on contract specifications and changes, customer service, tobacco cessation, and core coaching competencies, including motivational interviewing techniques. Current required trainings for FCS Employees include:

1. FCS will ensure that all Quitline coaches are fully certified tobacco treatment specialists (CTTS).
2. Motivational Interviewing (MI) is a goal-directed, client-centered counseling style for eliciting behavioral change by helping clients to explore and resolve ambivalence. The operational assumption in MI is that ambivalent attitudes or lack of resolve is the primary obstacle to behavioral change, so that the examination and resolution of ambivalence becomes its key goal. MI has been applied to a wide range of problem behaviors related to alcohol and substance abuse as well as health promotion, medical treatment adherence, and mental health issues.
3. Mental Health First Aid is an 8-hour course that gives people the skills to help someone who is developing a mental health problem or experiencing a mental health crisis. The evidence behind the program demonstrates that it does build mental health literacy, helping the public identify, understand, and respond to signs of mental illness.
4. Cultural competency provides staff with the skills that are necessary to provide services in cross-cultural situations.
5. Customer service training and practice is required of all staff. This training includes both a presentation and skills practice.
6. Health Information Portability and Accountability Act (HIPAA) compliance courses have been completed by all FCS staff.
7. Applied Suicide Intervention Skills Training (ASIST) is a two-day interactive workshop in suicide first aid. ASIST teaches participants to recognize when someone may have thoughts of suicide and work with them to create a plan that will support their immediate safety.
8. iCarol – Call agents are provided hands on training in data entry utilizing iCarol, the helpline database management system that is used by FCS to track data for all FCS helplines.
9. Documentation training is provided to ensure all staff have the skills necessary to record calls accurately in iCarol. Staff will practice the skill of documenting a call in order to gain practice in reporting the essential facts concisely and in a grammatical format that can be understood by their co-workers.

4.1.4.5 Staffing Plan – FCS will have a staff plan in place with Tobacco Quitline agents and coaches providing a live call response by Tobacco Quitline agents, coaches or program receptionist for a minimum of 64 hours per week. The hours will be Monday –Friday 10am-8:00pm and Saturday and Sunday 10:00am-5:00pm. At times of high volume, and when all agents, coaches and administrative staff are on calls, incoming calls may go to voicemail. Voicemail will be returned as soon as possible on the next business day.

4.1.4.6 Telephone System – FCS uses ShoreTel telephone management systems. FCS currently has approximately 75 telephone stations in place. The system manages all incoming and outgoing calls, and collects data such as time of call, length of call, missed calls, number of calls received, and wait time. FCS commits to only using a phone system that has the capacity to fully support multiple incoming and outgoing calls.

4.1.4.7 Data – Any telephone management system utilized by FCS will have the ability to collect, analyze, and report on data of calls. The FCS phone system will manage all incoming and outgoing calls, and will collect data such as time of call, length of call, missed calls, number of calls received, and wait time.

4.1.4.8 Response to High Call Volume – FCS will adjust scheduling of staff appropriately to accommodate high call volume time frames. For after hours calls, messages will be responded to within 24 hours.

4.1.4.9 Privacy and Confidentiality – FCS is committed to providing privacy and confidentiality for helpline callers. FCS assures the maintenance of all records in accordance with laws of the United States and the state of West Virginia. All FCS employees have completed courses specifically dealing with Health Information Portability and Accountability Act (HIPAA) compliance.

4.1.5 Enrollment and Eligibility Protocol for DTP

4.1.5.1 Demographic and Enrollment Data - FCS will use the iCarol data management system to collect all demographic information including but not limited to name, address, date of birth, telephone number, email address and all other NAQC MDS data.

4.1.5.2 Insurance Data – FCS will obtain and record insurance specifics and pregnancy status to accompany each caller profile in iCarol.

4.1.5.3 Assessment - FCS Quitline coaches will use the Fagerstrom Scale to evaluate individual Quitline participant's willingness and motivation to quit.

4.1.5.4 Tobacco Use History - FCS will use the iCarol database to collect and store participants' lifetime tobacco use and experience including history of use, previous attempts to quit and current use.

4.1.5.5 Consent for Follow-up – FCS will obtain consent for follow-up for each enrolled participant.

4.1.6 Enrollment and Eligibility Protocol for OMCFH-Pregnant Smokers

4.1.6.1 Demographic and Enrollment Data - FCS will use the iCarol data management system to collect all demographic information including but not limited to name, address, date of birth, telephone number, email address and all other NAQC MDS data.

4.1.6.2 Insurance Data – FCS will obtain and record insurance specifics and pregnancy status for each caller.

4.1.6.3 Assessment - FCS Quitline coaches will use the Fagerstrom Scale to evaluate individual Quitline participant's willingness and motivation to quit.

4.1.6.4 Tobacco History - FCS will use the iCarol database to collect and store participants' lifetime tobacco use and experience including history of use, previous attempts to quit and current use.

4.1.6.5 Consent for Follow-up - FCS will obtain consent for follow-up for each enrolled participant.

4.1.7 Enrollment Eligibility Protocol for Medicaid

4.1.7.1 Demographic and Enrollment Data - FCS will use the iCarol data management system to collect all demographic information including but not limited to name, address, date of birth, telephone number, email address and all other NAQC MDS data.

4.1.7.2 Medicaid Eligibility Verification – FCS will check Medicaid eligibility through www.wvmmis.com Molina website which is live eligibility check for all Medicaid services with in WV. If website is not functioning, then FCS will contact the direct number to check eligibility.

4.1.7.3 Insurance and Pregnancy Data - FCS will obtain and record insurance specifics and pregnancy status to keep with their caller profile in iCarol. If the member is covered by an MCO, FCS will forward the call on to the appropriate MCO unless the MCO has contracted with FCS to provide tobacco cessation services.

4.1.7.4 Assessment - FCS Quitline coaches will use the Fagerstrom Scale to evaluate individual Quitline participant's willingness and motivation to quit.

4.1.7.5 Tobacco History - FCS will use the iCarol database to collect and store participants' lifetime tobacco use and experience including history of use, previous attempts to quit and current use.

4.1.7.6 NRT Prescription – FCS will direct the member to their primary care provider to obtain a prescription for NRT.

4.1.7.7 Rational Drug Therapy – FCS will contact Rational Drug Therapy to authorize prescription for NRT.

4.1.7.8 Proactive Coaching Calls – FCS Quitline coaches will contact the member every two weeks for a total of four proactive calls.

4.1.7.9 Reactive Coaching Calls – FCS will provide no more than four reactive coaching calls.

4.1.7.10 Attempts to Contact – FCS Quitline coaches will attempt to contact members four times prior to closing a case. Means of attempt may include call, email and text. If FCS Quitline

coaches cannot contact the member by phone, email, or text then the case will be closed with notation of all attempted communication.

4.1.7.11 Benefit Limitations – FCS will limit the Medicaid member to one twelve-week treatment period per calendar year.

4.1.7.12 Benefit Exceptions for Pregnancy - All pregnant females will be given eligibility for additional courses of treatment for every pregnancy.

4.1.8 Nicotine Replacement Therapy (NRT) Protocol for DTP

4.1.8.1 Description of Protocols – FCS will draft documents that describe the protocols for NRT that can be provided to Quitline participants, medical professionals, and the DTP. The protocols will follow the Mayo Clinic NDC Tobacco Dependence Treatment guidelines for NRT.

4.1.8.2 NRT Education for Callers – FCS will develop and distribute educational packets to callers about the various NRT options, the rationale behind the selection of a particular NRT method, and the process for being approved for NRT. The educational packet will also include information about the benefits and risks associated with NRT. Finally, the packet will explain how the NRT products will be delivered to the participant. This packet of information will be provided to the caller by US Mail and/or email.

4.1.8.3 Verification of Receipt of Educational Packet and NRT Shipments – FCS will utilize the USPS mail tracking system to verify the delivery of educational packets to Quitline callers. Email delivery of information to the caller will be tracked as well. FCS will require the NRT provider to use package tracking to verify delivery of NRT supplies to the callers. Each shipment shall contain a two-week supply of NRT.

4.1.8.4 NRT Supplies – FCS will contract with the NRT vendor to ship the following quantities of products to callers based on the method of NRT that is appropriate:

- Nicotine Gum – 2mg or 4mg – 24 pieces per day
- Nicotine Patch – 7mg, or 14mg, or 21mg – 1 patch per day
- Nicotine Lozenges – 2mg or 4mg – 20 lozenges per day

Selection of the NRT method for each caller will be based on the Mayo Clinic guidelines mentioned above.

4.1.8.5 Age Verification – FCS will require all callers to submit a copy of their drivers' license to verify their age. Callers under eighteen (18) years of age may not receive NRT without the express written consent of a parent or legal guardian and approval from a physician. FCS will develop a parental permission form and a physician approval form that must be submitted for underage callers who require NRT. These forms will be provided to the parent/guardian by US mail, email or fax. The forms can be returned to the Tobacco Quitline coach by US mail, email, or secure, HIPAA compliant fax.

4.1.8.6 NRT Smokeless/Heavily Addicted Dual Therapy – FCS will consult with the Quitline Medical Director when assisting callers who use smokeless tobacco or who by their level of tobacco usage are considered to be heavily addicted. The Medical Director will make determinations on a case by case basis as to whether dual therapy (a combination of patches, gum and/or lozenges) should be offered to the caller.

4.1.9 Protocol for Medicaid

4.1.9.1 Rational Drug Therapy – FCS will contact Rational Drug Therapy to provide authorization for a Medicaid or MCO member to receive the approved drugs for tobacco cessation. Medicaid and MDO members are not eligible to receive shipments from the FCS NRT contracted vendor.

4.1.9.2 Prior Authorization - FCS will verify that the Medicaid member is eligible to receive NRT. FCS will guarantee that a prior authorization has been obtained. The products are limited to a maximum of the following:

Nicotine Gum – 24 pieces per day

Nicotine Patches – 1 patch per day

Nicotine Lozenges – 20 lozenges per day

Nicotine Inhaler – 168 inhalers per 30 days

Nicotine Nasal Spray – 4 spray bottles per 30 days (this therapy is reserved for those who have failed with other forms of nicotine replacement therapy)

Bupropion – 300 mg daily

Varenicline – 2mg daily

4.1.10 Evaluation, Research, and Data Reporting

4.1.10.1 External Evaluator – FCS will contract with Dr. James Cercone of University of Charleston as the external evaluator to conduct an annual evaluation of Quitline services. Dr. James Cercone is a Professor and Chair of Data Analytics and Computer Science at University of Charleston. FCS will use the NAQC MDS follow-up survey evaluation methods. The evaluation will include participant satisfaction, seven-month quit rates, and perform bivariate analysis to determine correlations between participant demographics, satisfaction, and quit rates. The external evaluator will use seven-month quit rates to calculate both intent-to-treat and respondent rates.

4.1.10.2 Satisfaction Surveys – FCS will conduct seven-month follow-ups on all participants, with a minimum response rate of 40% by utilizing multiple points of contact including mail, email, and/or text notifications and phone surveys. FCS will strive for at least 50% follow-up response rate to increase validity via NAQC recommendations.

4.1.10.3 Data Transparency – FCS will provide open access to Quitline data to BPH, DTP, BMS, OMCFH, and the external evaluator. All data can be formatted into raw numbers so no

personal health information of individual callers will be accessed. Access will be easily searchable, accessible, and user-friendly, via the iCarol database.

Budget Information

First Choice Services, Inc. (FCS) is pleased to submit the following bid to continue the operation of the West Virginia Tobacco Quitline. We have enjoyed our relationship with State of West Virginia for the Tobacco Quitline Program and look forward to continuing that relationship.

Contract Manager

If awarded the West Virginia Tobacco Quitline Contract, Lindsay Hatfield, Program Director for FCS, will serve as the Contract Manager.

Contract Manager: Lindsay Hatfield, Program Director

Telephone Number: (304) 410-2590

Fax Number: (304) 356-5845

Email Address: lhatfield@firstchoiceservices.org

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ EHP2100000002

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 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.

First Choice Services, Inc.
Company
 CFO
Authorized Signature
3/15/21
Date

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

Attachment 1

Coaching Call Requirements:

Discussion for coaching calls:

Core Coaching- what to discuss in each call

- Triggers
- Withdraw Symptoms
- Motivations
- Strategies (depending on triggers...)
- Past attempts – what worked/what has not worked
- MI Techniques
- NRT/Medication
- Complaints/Success Stories

Lindsay Hatfield
190 Mountain Highlands Rdg
Charleston, WV 25309
304-544-5453

LINDSY HATFIELD

CURRENT TITLE

Program Director

Education and Experience:

Bachelors Degree studying Marketing and Management
Certified Medical Revenue Manager
Medical Terminology Certificate
15 years Management Experience
6 years of Pharmacy Billing and Management
Data Analytics Specialist

Committee Involvement:

- NAQC-North American Quitline Consortium
- Baby and Me Tobacco Free
- WV Perinatal Partnership
- Quit and Stay Quit Mondays
- American Lung Association
- Coalition for a Tobacco Free WV
- HB2525 Pharmacy Bill WV – Krista Capehart WV Board of Pharmacy Director of Professional and Regulatory Affairs

WORK HISTORY:

First Choice Services

Program Director 2016-Present

Program Director

Currently the Program Director over The WV Tobacco Quitline and Program Director for PA Get Help Now. Developed processes within the helplines on intake reporting for daily call logs within contact records. Audited the Quitlines contracts, monthly billing, call reports, and enrollments/coaching calls. Discussions with Medicaid, MCO's, and Bureau of Public Health on policy changes and updates within The Quitline. Communicate with pharmacies, Physician offices, and various committess discussing the Quitline's efforts on connecting participants and The Quitline in order to streamline the process to ensure complete quit success. Managing staff on day to day operations of the program to ensure efficiency in maximizing enrollments and completed coaching calls for all participants successful completion of the program. Partnered with IT department at WVU Medical and embedded the fax referral form within the EHR system that is used by all medical staff contracted with the Hospital.

MCA Medical Claims Assistance

Processor/QA Committee

2010-2016

Lead Business to Business sales while also developing relationships with ambulance and fire companies through selling billing, our software, and several other products that would benefit the revenue for each company. Developed several marketing tools to aid in selling which included presentations, leave behinds, packets, along with mass emails. Managed staff for each insurance group to ensure maximum payment per claim.

Responsible for Lawrence Co, Vinton Co. EMS, and Tiltonsville groups medical billing. Head of the QA/QI committee concerning procedures performed on a run. Duties include being available for each squads needs at all times, taking control and guiding them through each process of billing procedures. Making sure that each squad is compliant with Medicare guidelines while also satisfying each patient needs. Meeting with the director of Lawrence county EMS each week concerning financial issues with the squad. Daily conversations with the squads to ensure the highest quality of each run.

Radiology Incorporated

Insurance Specialist/Account Billing

2004-2010

Managed patient accounts and staff by obtaining payment from insurance companies and develop more efficient processes for day to day tasks. Communicated with patients concerning status of the accounts pending insurance payments, the contract percentages with the insurance company, and also maintaining payment plans on large accounts to obtain payment in a timely manner. Responsibilities included training new employees, back up to the supervisor in the event she was not available, and also maintaining goals set by the company for workers compensation, PEIA insurance, and private pay accounts. Developed extensive relationships with multiple insurance companies and also with other medical facilities billing staff in the tri-state area.

JAYNE MARIE KINNEY- BA, CTTS

EDUCATION/CERTIFICATIONS

Marshall University, Huntington, West Virginia

- BA in Criminal Justice/Legal Studies
- Minor in English and Psychology
- Substitute Teacher Training Certificate
- Certified Tobacco Treatment Specialist
- Freedom From Smoking Certification
- YogaFit Teacher Training Program Certificate
- National Certificate in Tobacco Treatment Practice

EMPLOYMENT HISTORY

July 2017 to Present: Health and Wellness Coach – Certified Tobacco Treatment Specialist, First Choice Services
Charleston, WV

- Provided participants services necessary to reduce or eliminate unhealthy lifestyle behaviors and to promote lifestyle habits, utilized techniques to educate wellness needs, developed goal-oriented outcomes to equip participants with the necessary tools and skills to manage and control their overall wellbeing, and supported behavior modifications to ensure customer satisfaction.
- Responsible for understanding the process of health promotion programs including; tobacco cessation, weight management, and other preventative maintenance programs.
- Managed a caseload of 250+ participants while utilizing everyday use of time-management and multi-tasking skills. Maintained individual licensure and/or certifications.

August 2015 – July 2017: Program Manager - WV Tobacco Quitline - Health and Wellness Coach - Certified Tobacco Treatment Specialist, beBetter Health
Poca, WV

- Directly responsible for managing the WV Tobacco Quitline services, managing client relationships, and the Quitline call center staff.
- Works directly with beBetter Health and Wellness coaches and call center staff, to ensure quality assurance to all WV residents quitting tobacco.
- Reports for all Quitline services, both required and ad-hoc.
- Attends trainings across the state of WV to inform and educate others of the most up to date guidelines and developments of tobacco products and smoking cessation services.
- Guides and directs the development of Quitline processes of improvements to ensure maximum efficient performance of daily Quitline operations.
- Partner with WV Perinatal Partnership Committees to assist in improving the health outcomes for pregnant women.

March 2014 - August 2015: Health and Wellness Coach – Certified Tobacco Treatment Specialist,
beBetter Health, Inc
Poca, WV

- Provided participants services necessary to reduce or eliminate unhealthy lifestyle behaviors and to promote lifestyle habits, utilized techniques to educate wellness needs, developed goal-oriented outcomes to equip participants with the necessary tools and skills to manage and control their overall wellbeing, and supported behavior modifications to ensure customer satisfaction.
- Responsible for understanding the process of health promotion programs including; tobacco cessation, weight management, and other preventative maintenance programs.
- Managed a caseload of 250+ participants while utilizing everyday use of time-management and multi-tasking skills. Maintained individual licensure and/or certifications.
- Provided training in Tobacco Treatment to new First Choice employees

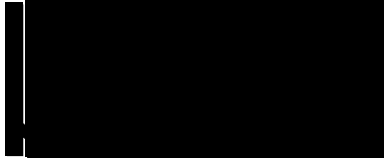
August 2012 - March 2014: Tobacco Treatment Specialist/Health Promotion Coach, WV
Prevention Research Center/WVUH Pulmonary & Critical Care Medicine Clinic, West Virginia
University
Morgantown, WV

- Provided clear and accurate information about the consequences of tobacco use, developed individualized treatment plans using comprehensive, evidence-based assessments and treatment strategies including effective medications and behavioral strategies for quitting and staying quit.
- Collected CO2 readings and conducted nicotine dependence assessments with patients suffering from illnesses that included, but not limited to, COPD, asthma, and lung cancer.
- Referred patients to the WV Quitline for enrollment and scheduled for follow-up counselling appointments with me. Followed the Mayo Clinic Nicotine Dependence Clinic protocol and created treatment plans with follow-up patients.
- Worked with Pulmonary physicians to ensure accurate pharmacotherapy is given to fully treat withdrawal symptoms.
- Collaborated with the Respiratory Therapy team at WVU hospital to work together to assist inpatient COPD patients with quitting tobacco.
- Demonstrated a high level of proficiency in the treatment of tobacco dependence by completing coursework, documenting experience, educating, assessing, and counseling patients, and continuing to work with patients to assist them in remaining tobacco free.
- Completed several webinars on tobacco dependence and in May of 2013, attended the Annual Mayo Clinic Nicotine Dependence Conference in Rochester, MN.

September 2010 - August 2012: Project Coordinator/Research Assistant/Health Promotion
Coach, Pharmaceutical Systems and Policy Department, West Virginia University
Morgantown, WV

- Worked closely with the project director of a behavioral and motivational research study, "Promoting Smoking Cessation Among Cancer Patients: Opportunities For Intervention."
- Counseled cancer patients at the Mary Babb Randolph Cancer Center (MBRCC) who continued to smoke following a cancer diagnosis.
- Helped to identify and target effective cessation interventions to improve health outcomes and treatment effectiveness.
- Worked closely, and in collaboration with, the MBRCC.

Ashley M. Kirk



CAREER SUMMARY:

Enthusiastic and dedicated health professional with 13 years of experience in corporate health and wellness. Proven expertise in motivational interviewing, stages of change, and single concept learning. Self-motivated, with the ability to work under pressure in a multi-task environment while proving the ability to exceed expectations and provide superior customer service.

EXPERIENCE:

First Choice Services

Health & Wellness Coach, Certified Tobacco Treatment Specialist

- HIPAA compliant
- Enrolling Quitline participants and coaching them towards living a tobacco free life
- Utilizing Motivational Interviewing skills in order to educate and assess wellness needs in different health promotion programs including tobacco cessation, weight management, nutrition, exercise, and stress management
- Manage a participant caseload of 400+ participants while providing proper clinical documentation

beBetter Health, August 2015-July 2017

Manager of Health Coaching Services

- Provide direct supervision of Health Coaches ensuring that all assigned staff are compliant with all applicable policies, procedures, regulations, and/or applicable State/Federal laws with regard to the provision of services.
- Performs administrative duties related to the supervision of assigned staff, e.g. interviewing, conducting performance reviews, scheduling of personnel, time & attendance management, and other related tasks.
- Monitor and report on individual and department performance.
- Monitor calls to ensure quality assurance
- Coordinate staff meetings and trainings
- Prepare staff productivity reports
- Assist in managing a State tobacco Quitline
- Oversee IT helpdesk personnel
- Actively performing coaching duties

beBetter Health, April 2012-August 2015

Health & Wellness Coach, Certified Tobacco Treatment Specialist

- HIPAA compliant
- Enrolling Quitline participants and coaching them towards living a tobacco free life
- Utilizing Motivational Interviewing skills in order to educate and assess wellness needs in different health promotion programs including tobacco cessation, weight management, nutrition, exercise, and stress management
- Manage a participant caseload of 400+ participants while providing proper clinical documentation

Nationwide Insurance, (Nationwide Better Health) October 2008-October 2011

Solon, Ohio

Lifestyle Health Coach

- HIPAA compliant

- Coach, educate, and support participants towards lifestyle change goals
- Used quality coaching styles such as motivational interviewing techniques, stages of change, and single-concept learning
- The programs that are coached consist of weight management, nutrition and exercise education, smoking cessation, preventive care, as well as improving cardiovascular health
- Various other customer service and computer tasks are performed throughout each day, along with keeping each participants' information in complete confidence
- Chosen to run staff meetings, perform major projects and presentations as needed (in addition to daily responsibilities and routine)
- Responsible for planning monthly activities for in-house and remote associates to maintain morale

Kent Ridge at Golden Pond Assisted Living Facility, *May 2006-August 2008*

Kent, Ohio

Dietary Server

- Serving meals to residents
- Utilized proper food safety and handling procedures through meal preparation and service
- Trainee for new associates

Robinson Memorial Hospital, *November 2005-July 2008*

Ravenna, Ohio

Diet Clerk/Supervisor

- Manage and supervise nutrition staff members
- Edit patient menus according to their specific diet
- Various customer service duties such as answering phones, data entry, filing, etc.
- Organize and facilitate patients' diet orders; HIPPA compliant
- Educate and explain hospital diets to patients

EDUCATION: Bachelor of Science in Nutrition & Dietetics, Minor in Psychology

Kent State University- Kent, Ohio

- Proficient in all products of Microsoft Office
- Self-Motivated with a high level of drive and an ability to coordinate others & activities
- Exceptional communication skills in one-to-one, small group, team settings; also very productive working independently
- Excellent organizational and time-management skills, along with multi-tasking abilities
- CTTTS Certified since 2015 through Mayo Clinic
- CPR certified

West Virginia Ethics Commission
Disclosure of Interested Parties to Contracts

(Required by W. Va. Code § 6D-1-2)

Name of Contracting Business Entity: First Choice Services, Inc. Address: 1 Hillcrest Dr. E, Ste 400
Charleston, WV 25311

Name of Authorized Agent: _____ Address: same as above

Contract Number: _____ Contract Description: Tobacco Cessation Quitline

Governmental agency awarding contract: Health and Human Resources - BPH

Check here if this is a Supplemental Disclosure

List the Names of Interested Parties to the contract which are known or reasonably anticipated by the contracting business entity for each category below (attach additional pages if necessary):

1. Subcontractors or other entities performing work or service under the Contract

Check here if none, otherwise list entity/individual names below.

SAR attached

2. Any person or entity who owns 25% or more of contracting entity (not applicable to publicly traded entities)

Check here if none, otherwise list entity/individual names below.

3. Any person or entity that facilitated, or negotiated the terms of, the applicable contract (excluding legal services related to the negotiation or drafting of the applicable contract)

Check here if none, otherwise list entity/individual names below.

Signature: *[Signature]* CFO Date Signed: 3-15-21

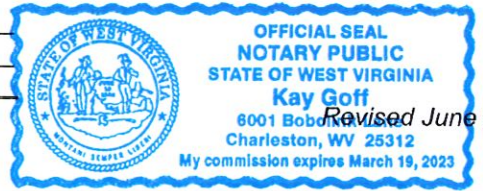
Notary Verification

State of West Virginia, County of Kanawha:

I, _____, the authorized agent of the contracting business entity listed above, being duly sworn, acknowledge that the Disclosure herein is being made under oath and under the penalty of perjury.

Taken, sworn to and subscribed before me this 15 day of March, 2023.
[Signature]
Notary Public's Signature

To be completed by State Agency:
Date Received by State Agency: _____
Date submitted to Ethics Commission: _____
Governmental agency submitting Disclosure: _____



Revised June 8, 2018

Disclosure of subcontractors or other entities performing work or service under the contract:

1. GlaxoSmithKline
(provides tobacco cessation product and shipping)
2. Dr. Norman J. Montalto
(Clinical/Medical director)
3. University of Charleston
(perform external evaluation for WV Tobacco Quitline)

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, 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: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. 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.

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.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"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.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: First Choice Services, Inc.

Authorized Signature: [Signature] CFO Date: 3/15/21

State of W.V.

County of Kanawha, to-wit:

Taken, subscribed, and sworn to before me this 15 day of March 15, 2021.

My Commission expires March 19, 2023, 2023.

AFFIX SEAL HERE



NOTARY PUBLIC

[Signature]

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 Vendor Preference, if applicable.

1. **Application is made for 2.5% vendor preference for the reason checked:**
 Bidder is an individual resident vendor and has resided continuously in West Virginia, 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**,
 Bidder is a resident vendor partnership, association, or corporation with at least eighty percent of ownership interest of bidder held by another entity that meets the applicable four year residency requirement; **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% 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% vendor preference for the reason checked:**
 Bidder is a nonresident vendor that employs a minimum of one hundred state residents, or a nonresident vendor which has an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia and employs a minimum of one hundred state residents, and for purposes of producing or distributing the commodities or completing the project which is the subject of the bidder's bid and continuously over the entire term of the project, on average at least seventy-five percent of the bidder's employees or the bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years and the vendor's bid; **or**,
4. **Application is made for 5% 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% 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% 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.
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.**
 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.
8. **Application is made for reciprocal preference.**
 Bidder is a West Virginia resident and is requesting reciprocal preference to the extent that it applies.

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) rescind the contract or purchase order; 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.

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: First Choice Services, Inc.

Signed: 

Date: 3/15/21

Title: CFO

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