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Header 4

List View

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

Procurement Folder: 909208

SO Doc Code: CRFQ

Procurement Type: Central Master Agreement

SO Dept: 0511

Vendor ID: VS0000025838

SO Doc ID: HHR2200000001

Legal Name: MTX Group Inc.

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Solicitation Description: STATEWIDE CASE MANAGEMENT SYSTEM

Responded By User ID: mtxgroup

Total of Header Attachments: 4

Total of All Attachments: 4

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Department of Administration  
 Purchasing Division  
 2019 Washington Street East  
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**State of West Virginia  
 Solicitation Response**

**Proc Folder:** 909208  
**Solicitation Description:** STATEWIDE CASE MANAGEMENT SYSTEM  
**Proc Type:** Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2021-08-19 13:30	SR 0511 ESR08192100000001217	1

**VENDOR**  
 VS0000025838  
 MTX Group Inc.

**Solicitation Number:** CRFQ 0511 HHR2200000001  
**Total Bid:** 148741.6900000000023283064365 **Response Date:** 2021-08-19 **Response Time:** 13:26:28  
**Comments:** MTX and Salesforce has provided discounting pricing in the previous page. We are committed to helping the Foster Care Ombudsman Stakeholders reach their IT goals with the Salesforce platform.

**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	Enterprise system management software				109850.00

Comm Code	Manufacturer	Specification	Model #
43232304			

**Commodity Line Comments:** MTX is willing to invest in the state of West Virginia. MTX has provided the most competitive price possible to try and fit in best with the agency s budget. MTX is committing to helping the Foster Care Ombudsman Stakeholders

**Extended Description:**

Phase 1 - pre-operational

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Computer software licensing service				18891.69

Comm Code	Manufacturer	Specification	Model #
81112501			

**Commodity Line Comments:** Service Cloud Enterprise Edition  
Customer Community - Logins

**Extended Description:**

Software Licensing Fees

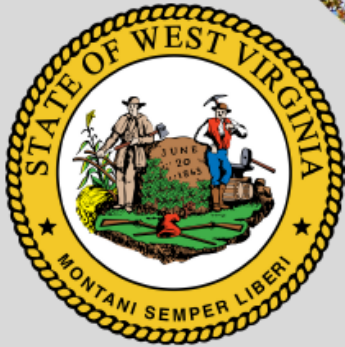
Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Database management system software maintenance				20000.00

Comm Code	Manufacturer	Specification	Model #
81112205			

**Commodity Line Comments:** MTX typically recommends that maintenance and support contracts are 20% of the implementation value for a years worth of hours. MTX provides a bucket of hours for maintenance and support that can be used as needed,

**Extended Description:**

Modifications and Enhancements, Support



**STATE OF WEST VIRGINIA**  
Statewide Case Management System  
CRFQ 0511 HHR2200000001

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**AN EXPERIENCED  
GUIDE WHO KNOWS  
YOUR TERRAIN**

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## Transmittal Letter

West Virginia Department of Administration, Purchasing Division  
2019 Washington Street East  
Charleston, WV 25305-0130

To Whom It May Concern,

[MTX Group, Inc.](#) (MTX) is pleased to submit our response on the Salesforce Platform for this solicitation from the State of West Virginia, Department of Health and Human Resources (DHHR) to support the Foster Care Ombudsman (FCO) with a statewide case management system. We propose to the State an enterprise-level, cloud-based foster care case management solution to support the FCO in its mission to advocate for foster children and foster parents. The system will assist FCO staff to identify and resolve significant problems faced by foster children and foster parents.

MTX is a global services and enterprise cloud consulting company focused on helping customers modernize their systems. We have extensive experience implementing cloud-based solutions, including case management services, for government agencies to help them serve their people. MTX supports a number of public sector entities to create efficient processes, communicate effectively with their populations, and manage their programs as they continue to evolve.

MTX was founded in 2008 and is headquartered in Frisco, Texas, with offices throughout the United States, India, Canada, and Australia. We are experiencing hyper-growth with a focus on client satisfaction and a reputation of zero failed projects. We value the success of our clients and work to ensure we deliver over expectations to support them today and into the future.

This response is effective for a period of 180 days from the final RFQ response due date. The undersigned acknowledges having read and understood the specifications included in the RFQ and agrees to the terms of the RFQ. In case of any clarifications regarding the RFQ, please reach out to any of the below contacts:

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Thank you for your consideration.

Sincerely,

Das Nobel, CEO



## Executive Summary

West Virginia needs a vendor to provide an efficient Foster Care Ombudsman (FCO) a Statewide Case Management solution to receive, evaluate, refer, assign, monitor, investigate, and report on foster care related concerns, complaints, and identified systemic issues. ***MTX is pleased to submit the following proposal to the Department of Health and Human Resources (DHHR) for a cloud-based, statewide case management solution to meet the needs of the FCO unit and stakeholders, and also supply the DHHR with a future-proof system that can evolve as needs, legislation, and requirements change.***

MTX is a trusted partner for public sector organizations, state and city agencies in 30 U.S. states. MTX is a go to partner for Salesforce in the public sector, we have rich and varied experience in executing end-to-end digital transformation solutions for agencies focused on human health and safety. Some of these agencies include the New Hampshire Department of Health and Human Services, Massachusetts Department of Early Education and Care, and the New York City Police Department.

MTX is pleased to propose to DHHR a statewide foster care case management solution that will effectively manage FCO client complaints, drive outcomes for West Virginia's foster care system, and provide the State a system that is easily configurable to meet future needs. The solution can also help FCO produce reports and other necessary documentation. The following proposal details our experience, technical approach, guiding principles, and references that demonstrate MTX's ability to deliver a quality solution on time. Our team will provide flexibility throughout this engagement and make investments necessary to achieve success for FCO and, ultimately, help improve the lives of children in foster care.

MTX gave a demonstration of our investigate case management solution to the FCO unit before this solicitation was released. We have built this same exact solution for Massachusetts Early Education and Care and the New Hampshire Office of the Child Advocate. The FCO stakeholders were very pleased with our application on the Salesforce platform and highly suggested that we put a response in for this solicitation.

### **MTX brings the West Virginia DHHR key advantages for this implementation**

- ✓ Extensive experience with case management/client complaint management
- ✓ Dedicated team of experienced child welfare experts who are passionate about serving and protecting children
- ✓ Presence in numerous public sector child care, child welfare and human services organizations
  - ✓ 9.7 customer satisfaction rating
  - ✓ Speed to Market

### **MTX: Your Foster Care Solution Provider**

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MTX understands managing state foster care services requires focused, passionate experts who can manage solutions with the highest level of care. Our team consists of former agency





leaders and experts in the field that focused on child care, foster care, and wellbeing. MTX and our team of child care experts have the experience necessary to deliver a simple yet effective case management solution for the FCO unit. MTX will also offer continuous maintenance and operations support as needed on the application, at the request of the State.

### **MTX at a Glance**

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***MTX is a system integrator (SI) focused on simplifying and modernizing our clients' business workflows and processes, enabling them to securely manage data and interact with their users on a larger and more efficient scale.*** We specialize in merging component subsystems so our clients can manage multiple aspects of their programs within one solution. MTX offers the State the following services to ensure our solution's success:

- Comprehensive business management to support our solutions throughout the entire development process
- Training and support from discovery through implementation, optimization, and adoption of the solution
- Ongoing maintenance and support after “go-live”
- Strong partnership with Salesforce in the public sector for case management applications

In addition to strategizing and implementing robust enterprise solutions to meet our customer and stakeholder needs, MTX improves data quality and accessibility with focus on accuracy, quality, and actionable information to enhance decision-making.

MTX utilizes our strategic relationships with PaaS and SaaS developers including Salesforce, Amazon Web Services (AWS), Google, and Microsoft Azure to bring their robust enterprise-level solutions to our customers. We also integrate a wide range of software programs and tools to help our clients keep track of their customers, data, and business performance. By harnessing the power and features of industry leading third-party applications, we provide our clients with tailored solutions that comprise the most advanced options and features available and required to achieve their current and future business needs and service goals.

Going beyond our solutions, ***MTX uses a robust suite of advanced technologies to enable our clients to collect and unify data sources and access actionable information in real time to inform decisions and improve outcomes.*** Our customers quickly build their own capabilities to leverage the full power of data across their enterprise solutions and transform data into meaningful business intelligence. They are also leveraging it to personalize customer experiences, empower employees, and optimize supply chains.

MTX has grown to more than 1,075 employees globally and has successfully delivered more than 600 projects in the public and private sectors. Our vertical solutions team is versed in the business and service cases associated with our clients. Our technical leadership and staff are among the most qualified in the industry. And our customer-centric approach ensures all of our clients are fully engaged in achieving the goals of their current and future initiatives. ***With a relentless focus on engagement, quality, change enablement, and data, we are proud to say that we have had zero failed projects and 9.7 of 10 client satisfaction.***



Leveraging the Salesforce cloud platform, MTX modernizes government data management, upgrading processes, whether manual or a digital legacy system, to enable staff, partners, and residents to administer government services in a modern, efficient manner. In the public sector, Salesforce's trusted cloud platform and MTX's purpose-built applications help government employees and agencies collaborate easily and connect with residents and partners in ways not possible before.

### MTX: Partnering with Salesforce

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Salesforce is the enterprise cloud computing leader dedicated to helping companies and government agencies transform into connected organizations through social and mobile technologies. Salesforce will power more than two trillion B2B and B2C transactions this year for more than 150,000 customers, and millions of Trailblazers—the individuals and their organizations who are using Salesforce to drive innovation, grow their careers, transform their businesses and give back to the community.



The company's trusted cloud platform is creating a connected experience for over 3,500 government agencies worldwide, including all Federal cabinet-level Government agencies and all 50 U.S. States.

With the world's leading cloud platform, Salesforce is converting government data from legacy systems, empowering citizens, and connecting agencies to administer government in powerful new ways. Government agencies use Salesforce solutions for a multitude of government functions, including case management, grants management, constituent communications and correspondence management, 311, call/contact center management, licensing, permitting and inspections, outreach programs, learning management, volunteer management, project/program management, and even donor management, among numerous others.

Together with Salesforce, MTX has provided a multitude of case management/CRM solutions to our public sector clients. We help state agencies manage large amounts of data, while assisting with the management of resident issues, concerns, and communications. We look forward to delivering this same success to West Virginia.

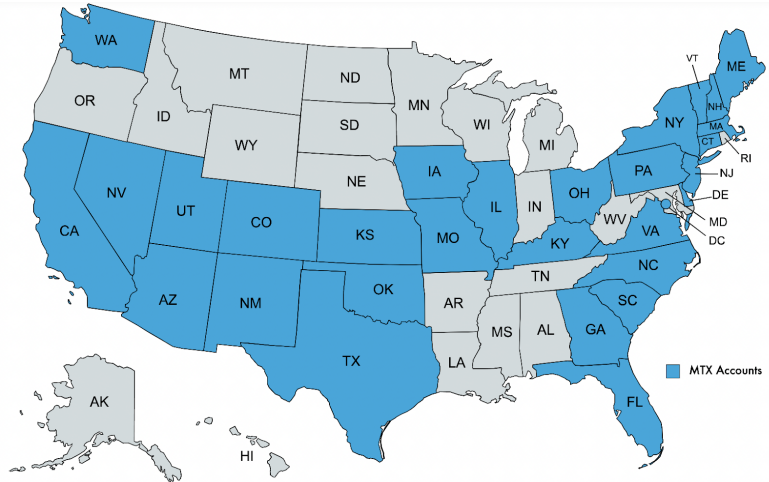
## Qualifications

MTX has varied experience and deep subject matter expertise gained through executing end-to-end digital IT transformations in 30 states, counties, and city governments on the Salesforce Platform. Our primary focus is serving essential public sector agencies, including health and human services, transportation, education, education, licensing and permits, and economic and workforce development all of which showcases the range of services we can provide to meet our client's unique needs.

As an accomplished IT consultancy, we utilize our modern technology approach in every aspect of our business. From customer surveys to social media outreach, we focus on the current and future needs of our clients and anticipate trends as they develop. We encourage in-person engagements to thoroughly understand our clients at a personal level.



Through all our engagements, MTX focuses on building effective relationships with our customers and providing dedicated executive leadership, technical expertise, and end-to-end project management to ensure success in every project. MTX is a trusted partner for IT modernization in 30 states—experience we will leverage to ensure a rapid and successful engagement with West Virginia.



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## Active and Past Experience with Other States

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Basic case management and CRM is at the heart of nearly every project MTX implements. Whether it is case management, grants management, licensing and permitting, or a health application, keeping track of constituents' concerns and complaints is crucial to the customer service aspect and success of any project. Below lists examples of our past case management projects, currently still active.

**1. New Hampshire Department of Health and Human Services (DHHS):** MTX implemented a case management solution for the Office of Child Advocate within New Hampshire's DHHS. The system is a case management solution designed to keep track of different types of cases, contacts, and investigations. MTX customized the reusable components to fit the case types required by OCA and automated a case routing workflow to replace a manual case triage process. The solution helped them increase efficiency through automated workflows and automation in their investigation processes. We have more information about our NH child care program in the "other child care programs" section below.

**2. Massachusetts Department of Early Education & Care (EEC):** MTX has built a multitude of child care functions for MA EEC, including an investigative case management feature. The solution is the same as the case management feature described above in the New Hampshire Office of Child Advocate project. We have more described below in the "other child care programs" section.

**3. New York City Police Department (NYPD):** The NYPD solution is a mobile case management application used by the NYPD force. This mobile case management application enables officers to track and collaborate on cases on their phone and computer if needed. This application allows NYPD officers and residents to submit complaints and other issues through the application. Officers can now manage follow-up communications with residents who have submitted cases easily through the app, and it also helps them to follow an intuitive workflow to ensure that the case or investigation is resolved.

**4. New York City Department of Health and Mental Hygiene (DOHMH):** The DOHMH is utilizing the MTX vaccine management and contact tracing system to monitor the COVID



activities throughout NYC. The vaccine management system is a very large case management/CRM system built to keep track of citizens who have received their first or second dose of the COVID vaccine. The contact tracing system helps NYC health officials track people who may have been exposed to other infected COVID individuals. This is also a large case management/CRM system.

**5. New Mexico Manufactured Housing Division (MHD):** MTX partnered with the State of New Mexico Manufactured Housing to implement a solution to enable permit application, as well as investigation, review, and approval of permits/requests by field staff. The solution addressed major backlogs by removing reliance on spreadsheets and antiquated tracking methods to streamline the intake, investigation, and complaint/question resolution. This solution helped New Mexico staff increase efficiency in resolving cases fast and more effectively with our case management module.

#### **Other Child Care Programs:**

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**New Hampshire Department of Health and Human Services (DHHS):** MTX has implemented an integrated child care system to digitize all manual processes, connect all child care departments, and help bring all child care processes into a centralized place. The solution is currently comprised of the following functionalities: (1) Child care licensing; (2) Child care search and service, (3) Educator registry, (4) Educator credentialing, (5) Educator training calendar, (6) Child care scholarships, (7) Child care resource and referral, and (8) Quality rating information system. (9) ARPA child care stabilization grants system.

**Massachusetts Early Education and Care (EEC):** MTX has also been partnered with EEC for multiple years, during the years we have worked with EEC staff to implement the following functionalities. (1) Child care licensing management and administration system, (2) CCDBG compliant child care search portal, (3) Visits and inspections management system, (4) Provider lifecycle management system, (5) Case, regulation and investigation management system, and (6) Background records check workflows. (7) Investigative case management feature. (8) ARPA child care stabilization grants system.

**New York State Office of Children and Family Services (OCFS):** MTX worked with OCFS to implement an ARPA child care grants management solution. The solution went live on 8/4. The solution provides an online portal for approximately 18,000 child care providers to apply for assistance, get approval based on predetermined business rules, the automatic disbursement, and monitoring of ARPA funds. The timeline from start to go-live was five weeks. Over half of the New York child care programs have already applied for grants in less than five business days.

**New Mexico Early Childhood Education & Care Department (NM ECECD):** MTX is currently working with NM ECECD to implement an ARPA child care grants management solution. The solution will provide an online portal for approximately 1000 NM child care providers to apply for assistance, get approval based on predetermined business rules, the automatic disbursement, and monitoring of ARPA funds. The timeline from start to go-live is four weeks. MTX is also implementing a similar grants management solution for facilitating the application, review approval and distribution of one time grant payments to child care professionals and report on



the grant application and funds distribution processes and the solution is planned to go-live in 5 weeks time.

**New Mexico Children, Youth, and Families Department (CYFD):** MTX partnered with CYFD to develop a technical solution that enabled CYFD to monitor and analyze grant usage among its various programs and related entities. The reporting and dashboard functionalities allowed CYFD to see how the funds were spent by these programs and the efficacy of this spending.

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## Client References

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We have listed our reference contacts below. The references for Massachusetts and New Hampshire are for child care agencies. The reference for New York City is for our COVID tracking and vaccine management system, a large application which contains a heavy case management aspect.

### The Massachusetts Department of Early Education and Care (EEC)

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#### Reference Contact Information

Lynne Philpot, Lead Technology Business Specialist  
[lynne.philpot@mass.gov](mailto:lynne.philpot@mass.gov)  
(800) 439-2370

### The New Hampshire Department of Health and Human Services (DHHS)

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#### Reference Contact Information

Mary Kernander, Information Technology Manager  
[mary.e.kernander@doit.nh.gov](mailto:mary.e.kernander@doit.nh.gov)  
(603) 230-3464

### New York City Department of Health and Mental Hygiene (DOHMH)

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#### Reference Contact Information

Steve Bezman, Deputy Commissioner - Applications  
[sbezman@doitt.nyc.gov](mailto:sbezman@doitt.nyc.gov)  
(646) 596-1875

## MTX and Salesforce: Best Fit for West Virginia

MTX partners with vendors who are experts in their field, such as Salesforce, a leading cloud platform provider. Our partnership with Salesforce allows us to deliver our integration and management capabilities on a modern, industry-leading platform. MTX and Salesforce work efficiently together to provide our clients with successful, efficient, and secure solutions that are tailored to their needs. As demonstrated through our demo with the State and detailed below, **our partnership with Salesforce will help us deliver Foster Care Management services to West Virginia, which can include system design, implementation, application/report**



configuration, user training, support services, and periodic upgrades/enhancements, as needed.

## Salesforce

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Salesforce's trusted cloud platform is creating a connected experience for over 3,400 government agencies worldwide, including all Federal cabinet-level Government agencies and 45 out of 50 U.S. states. Government agencies are using Salesforce solutions for a multitude of government functions including case management, grants management, constituent communications and correspondence management, 311, call/contact center management, licensing, permitting and inspections, outreach programs, learning management, volunteer management, project/program management, and donor management, among others.

## The Solution

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FCO staff and West Virginia residents will have an intuitive user experience with the MTX case management solution. The system automatically saves data, while prompting users to complete required fields to improve accuracy. The solution's portal can include links to instructional materials and references to instruct users on how to use the system. Our solution will improve the user experience for DHHR staff and allow secure access from any computer, tablet, or smartphone. This will reduce the time to enter data and eliminate barriers to timely data capture by enabling users to enter case information during or immediately after investigations and on-site visits.

The MTX solution stands apart from other solutions because of its world class capabilities for data visualization and analytics. Users have access to real time data and the ability to configure reports and dashboards to manage internal productivity and workload, meet state and federal reporting requirements, and drive program outcomes.

Our solution will also assign unique ID numbers for individuals in the system and provide identity resolution to identify and resolve instances of duplicates.

The MTX solution also features state of the art architecture that supports bidirectional interfaces through standard application programming interfaces. By standardizing interfaces, support is simplified enabling updates to interfaces when data needs to be changed or expanded. It also enables reuse of APIs to reduce time and cost.

Utilizing the Salesforce platform, the MTX solution also features industry-leading uptime, availability and redundancy, allowing DHHR Ombudsman staff to access cases whenever and wherever needed allowing staff work from their local/regional communities with ease.

## Proposed Solution

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MTX proposes our modular and configurable foster care case management solution that standardizes common functions including intake, assessment, remediation and reporting. The solution we are proposing starts small for your immediate needs, but is scalable to add other modules to the platform when the FCO desires other functionalities.



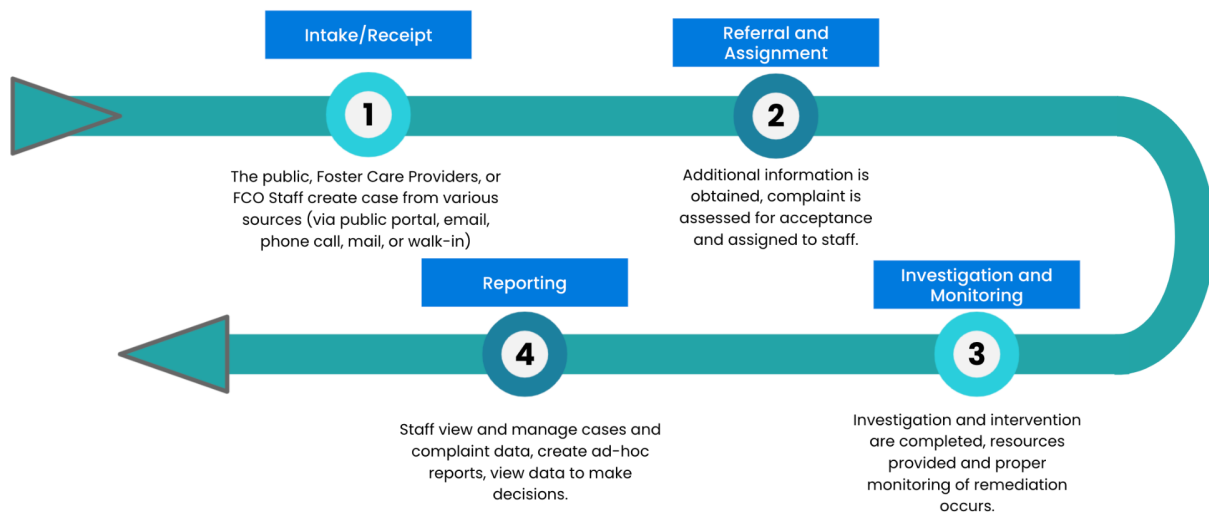


Each user in the advocacy for foster care rights has a unique role and journey. The system guides users through a step-by-step process to ensure the necessary information is captured correctly the first time. Role based access ensures that users see only the data they are authorized to view. Automation, robust reporting and structured decision making help FCO staff quickly assess large amounts of information to make informed decisions.

Technologically, the case management solution leverages industry-standard best practices such as single-sign on through any providers, utilization of application programming interfaces (APIs) for integrations, administrative configuration by a system administrator utilizing declarative statements in place of developmental languages (a “clicks not code” approach) and user interface/user experience (UI/UX) best practices for an efficient user interaction.

This diagram shows a sample user journey for a FCO employee.

### WV Foster Care Ombudsman Journey



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#### Intake Module

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The intake module is designed to be easy and convenient for FCO staff when fielding complaints. With prompts to ensure completeness when users submit complaints, and business rules to automate repetitive tasks, the Intake Module reduces administrative burden for FCO Staff.

Intake can occur through a variety of methods including webform, email, in-person, phone call to DHHR FCO and data entry by FCO from a fax or US Mail. The webform streamlines receipt of complaints from foster parents, foster children, and any other parties. The form can be open to anyone with internet access and/or the system can prompt the user to create an account. Creating an account allows a user to come back to a draft report, add more information or check the status of the FCO follow-up.



Another method for intake uses what Salesforce calls Email-to-Case. This feature captures an email message and automatically creates a case record that is then routed to FCO staff for screening and assessment. FCO staff can also intake information over the phone and manually enter the information into the system. Additionally, the Intake module supports offline capture of information, allowing FCO staff to perform intake activities in the field and sync data when internet access is available.

The intake structure with data validation and automation ensures that initial case information is complete from intake before FCO staff start assessment. The case and documentation is available for searching and real-time collaboration as soon as intake is complete. The module can also automate much of the intake process, such as prioritizing and escalating reports, allowing more time for FCO staff to focus on case management and outcomes. The Intake module allows for full control over the intake process to manage the current complaint process. With these flexible intake methods, the MTX solution significantly reduces effort for FCO staff.

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## Referral and Investigation

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The assessment and investigation module is designed to assist FCO staff in assessing risk and taking the best next step to address complaints. System automation summarizes information from Intake and combines it with any additional information that is known about the case and parties involved. FCO staff are able to see all parties involved with any particular case, in a one-to-many relationship, providing a holistic view of any complaint. Predetermined thresholds can automatically escalate high-risk cases for immediate review.

The guided referral and investigation workflow will prompt caseworkers to complete any applicable assessment, auto populating with existing data from Intake. The module does allow for free-form assessment of complaints but can be configured to automatically step FCO staff through specific assessment criteria, strengthening the validity of the complaints by assigning weights to assessment questions.

Based on the assessment, some cases can be referred for services, informational/educational delivery, or closure and some will be routed for more detailed investigation. To support an investigation, staff can document case comments, complete tasks, add documentation and supporting files, fill out information and forms wherever they are.

On-site assessments can be taken and interviews recorded and associated to the case at the click of the button. The platform is designed with mobile in mind so case, client, and family information is available on users' smart devices with the same access to real-time case information as they might have at their desks. Users can make updates, communicate with other FCO staff, and get notifications as events happen.

We also recognize that internet access is not always available for FCO staff in their respective regions, the platform is designed for offline use when this is the case. Users can access cached data and make updates that will sync to the system once they return to an area with internet connectivity.



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## Case Management

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The case management module encourages engagement with Foster Care entities. FCO staff have the ability to develop and collaborate on the intervention strategy leveraging a library of different plan templates based on common interventions to address any of the emerging themes within the FCO office (Communication, Treatment by the System, Placements, etc). Each template can be configured and modified over time to guide caseworkers to create plans with stakeholders to achieve positive outcomes for the rights of foster care children and families. Caseworkers will also document details from visitation if onsite visitation is necessary as part of intervention.

Collaboration with internal and external parties such as other state agencies, courts, service providers, educational resources and families can be facilitated in a number of ways. The case management module has the ability to send automated communication to entities associated with cases, as well as send system-wide notifications if/when necessary. The module is also scalable to more extensive communication and interfaces using application programming interfaces (APIs) to create bidirectional interfaces with other systems within the Ombudsman office (including back-office applications), additional systems, and external stakeholder systems. The MTX solution is capable of interfacing with any system and/or sending flat files for batch processing.

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## Reporting

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The reporting capabilities of the MTX case management solution are a differentiator when it comes to identifying trends, improving outcomes, and tracking staff efficiency. Data is available from the moment intake starts to allow for full case lifecycle metrics and drive improvements at every major milestone. Reporting and visualizations are all highly configurable by FCO administrators.

The reporting functionality easily aggregates individual case, client, person, and staff data, providing FCO staff with the availability to extract data to meet reporting requirements at automated intervals, configure reports ad-hoc, and drill into any specific area of interest. Additionally, data reporting will be available for performance, workload, task, and case status monitoring by case, user, team, and enterprise.

Extensive visualizations and dashboarding also accompany the reporting allowing staff and stakeholders to view trends associated with any data element, such as complaint type, complaint relationship, etc.

Dashboarding provides a summary view of the workload for individual case workers, as well as supervisors. The dashboard shows the volume of pending cases and response time, and helps escalate high-risk complaints.

Aside from case-specific data, the Case Management solution provides crucial auditability and reporting capabilities for system administrators, tracking all events that occur on a case, login and logout information, and all other administrative events.



## Our Project Approach

MTX has a long history of application development, with a focus on infrastructure analysis, enterprise resource planning, legacy system data migration, system maintenance, and IT modernization. We partner with our clients to fully understand, review, and map current integrations and system-wide networks to find ways to decrease costs, improve efficiency, and simplify IT workloads using cloud-based solutions. MTX has extensive experience with highly configurable cloud-based systems on platforms like Google, AWS, Salesforce, and Microsoft Azure. We leverage solutions and accelerators that emphasize configurability via pre-defined templates, applications, and rules. This enables easier maintenance, rapid deployment, assured functionality, and scalability.

Our emphasis on configurable development does not, however, preclude custom development. MTX has significant customization expertise developed through our partnerships where we have developed new functionalities on SaaS/PaaS platforms, integrating with legacy systems, and integrating disparate systems, thus ensuring uninterrupted business continuity while modernizing infrastructure. Our holistic technologies and client-centered approach, combined with specific expertise from our subject matter experts and former state agencies leaders, help us streamline and automate back office processes for our clients to prepare them for future scalability (i.e., enterprise resource planning).

***Project Implementation:*** MTX realizes that leadership and wrap-around expertise is not enough to ensure long term success. One of MTX's core strengths is the use of a hybrid Agile-Scrum Methodology, its extensive project management toolset, and its emphasis on metrics-driven outcomes. This hybrid methodology blends the best of Iterative and Predictive approaches and enables a creative process that anticipates the need for flexibility and applies a level of pragmatism. MTX maintains transparency, tests frequently, and delivers functionality as soon as it is developed. Our solution implementation approach not only ensures that we deliver a product which meets all requirements, but ensures the project stays within scope, on-time, and is adopted. Our enterprise project development methodology has five phases:

1. Initiation culminates with an official project kickoff meeting, which introduces core team members and ensures the alignment of expectations and objectives, approach and methodology, and clear understanding of roles and responsibilities.
2. Define and Design MTX engages with the client in detailed discovery sessions to map out all requirements, map the underlying technology to design optimal integration approaches, design the solution architecture, deliver detailed project plans, and define a full set of user stories. MTX collaborates with the client to vet early design decisions and begin planning. At the end, we review these stories with the client and seek sign-off to ensure the solution is built accordingly.
3. Development and Quality Assurance MTX rapidly and incrementally develops and prototypes the solution according to requirements and demos the solution for client review. This phase is marked by multiple iterative design sprints and each ends with a client review to confirm that the solution developed during that iteration meets requirements.
4. Training & Change Enablement and User Acceptance Testing (UAT) MTX Change Enablement meets with the client to discuss the training plan and develops the training



approach for all users. During UAT, select client users test the full solution to provide feedback and identify issues. MTX builds a detailed UAT plan and provides artifacts such as test scripts, manuals, and defect trackers. At the end, MTX reviews and provides a list of all identified and resolved issues and will seek UAT sign off. Any scope changes (other than defects) are marked in the solution roadmap.

5. Deployment and Thrive MTX deploys the system into production. Regression testing ensures all functionality is working as per specifications and deployment has not affected existing features. Once the solution is deployed, MTX stays with our clients via Managed Services to help them utilize their new infrastructure and ensure it remains stable and is improved according to roadmaps.








Change Enablement Ensures Long-Term Cloud, Digital, and IT Organizational Transformation. However, a new solution is only effective in providing value only as long as it is used. MTX takes a holistic approach to helping our clients and their stakeholders embrace their IT transformation. MTX acknowledges that engaging in full IT Organizational Transformation that occurs alongside infrastructure transformation is difficult, especially when clients have heavily invested in infrastructure. We differentiate ourselves by leading with Change Enablement throughout the entire process, collecting and utilizing all feedback to ensure our clients are informed at every step and are comfortable with the new system. We spend time with clients to define all personas of all client stakeholders that interact with the new, cloud-based PaaS systems and create a roadmap to achieve long-term change. Change Enablement wraps arounds our clients to ensure the most positive experience. Our approach to change emphasizes:

- Project Branding acknowledges that the customer experience starts before the customer interacts with a product. We work with the client to establish the vision, branding, and logo to solidify the project's outward appearance.
- Proactive Communications plan overlays the project plan and maps communications to milestones and actions as needed. This plan is very detailed and proactively develops client stakeholder awareness ahead of time. We engage clients to develop plans and materials to help client stakeholders utilize the system. Communication increases awareness and disseminates information.
- Webinars and Videos build the expertise necessary to leverage the new application. MTX has learned that live-trainings are the most effective at conveying knowledge to all client stakeholders. MTX also layers in micro-video training; this approach recognizes that short, informative, studio-quality, tailored videos are more effective and preferred over standard documentation.
- Metrics and Follow-Up Developing Metrics to measure project success is critical. MTX works with client leadership to understand what metrics are important and how and when they are measured. These checks identify areas of resistance or slower adoption where additional communication or training may be necessary. Follow-Up training solves lingering questions and reinforces learning.
























## Approach to Technical Requirements













MTX is dedicated to providing DHHR Foster Care Ombudsman staff with the most effective case management solution to meet the growing needs of your organization to ensure the integrity of department programs and operations including the fair, accurate and nondiscriminatory delivery of benefits and services to qualified state residents. The MTX proposed solution is capable of meeting all the requirements for the DHHR enterprise level, Cloud-based, statewide case management system.









Technical Requirements		
#	Requirement	Compliant?
4.1.1.1	Successful bidder will begin meetings with Foster Care Ombudsman staff, within 10 business days of contract award and will within 180 calendar days of contract award deliver a fully operational system in a Software-as-a-Service (SaaS) model, available 24/7 with an internet connection.	 <i>MTX has successfully implemented similar solutions in weeks instead of months and solution go-live is under 8 weeks on average.</i>
4.1.1.2	System must be modular to allow system upgrades and enhancements.	
4.1.1.3	System must be scalable for increasing the number of licensed users and to support unlimited persons, cases, contacts, activity transactions, and reports.	
4.1.1.4	System must enable administrative ability to create enterprise-wide announcements that are displayed on the user home page, which can be targeted to all users or specific users or group users.	
4.1.1.5	System must enable real time collaboration or access sharing with system users.	
4.1.1.6	System must be accessible from any of the following device types: laptop computer, tablet, desktop computer or, mobile phone and, must allow for speech-to-text functionality where applicable.	
4.1.1.7	System must make use of intuitive interface elements such as pop up calendars, widgets, and ergonomic features including minimal clicks and maximization of screen space to avoid scrolling.	



















4.1.1.8	System must maximize capabilities, i.e. predictive text and auto-fill, to reduce redundant data entry and keystrokes.	
4.1.1.9	System must be configurable.	 <i>The MTX solution leverages a "clicks not code" methodology, allowing for FCO staff to make changes to fields, workflows, reports, and views.</i>
4.1.1.10	System must provide the capability for authorized users to drill down to individual data elements in dashboard reports.	
4.1.1.11	System must capture and record all case details.	
4.1.1.12	System must provide a quick search capability based on a single field as well as an advanced search capability incorporating multiple fields and filters.	
4.1.1.13	Name fields must include capacity to enter and store nicknames, appellations, and suffixes.	
4.1.1.14	System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task and case status monitoring by case, user, team, and enterprise.	
4.1.1.15	System must maintain a chronological and reportable audit trail of activity by user and case, including a history of modifications to all data and event logs by record and user.	
4.1.1.16	System must track user login and logout history.	
4.1.1.17	System must provide access to all applications and user documentation, vendor use, and help tools within a single site.	
4.1.1.18	System must integrate seamlessly with back-office systems including versions of Microsoft Office, Microsoft Outlook, Google Docs, Google sheets, and Gmail.	
4.1.1.19	System must allow administrator to add, control and update user role-based security permissions by user or user group types.	

4.1.1.20	System must support users and administrators to schedule and prompt future date tasks, activities, calls and follow ups, and do so with role-based permissions, to other users.	 <i>The MTX solution has robust automation that can handle assignment of standardized tasks, activities, calls and follow ups.</i>
4.1.1.21	System function must incorporate spell check, cut and paste, and other routine word processor functions throughout narrative fields.	
4.1.1.22	System must allow document attachments to be associated with one or more record.	
4.1.1.23	System must allow documents to be thumbnail/first page previewed prior to full access.	
4.1.1.24	System must allow documents to be scanned into person and case records.	 <i>Documents can be scanned directly into cases utilizing integrations with both desktop scanners, multi-function devices, or directly from mobile devices.</i>
4.1.1.25	System must allow complaints and cases to be associated with one another.	
4.1.1.26	System must allow users to return to using a quick search feature to the three most recently accessed records or activities.	
4.1.1.27	System must provide capabilities to determine whether a caller, a person or case record already exists to avoid duplication.	 <i>The MTX solution includes identity resolution to prevent duplication during intake but also processes to resolve duplicate records if they do occur.</i>
4.1.1.28	System must provide a means to merge identified duplicate records through an automated process or manual process, and a means to undo a merge performed in error.	

4.1.1.29	System must manage essential information in a global record including demographics, telephone numbers, email addresses, county, region, map, links, contacts, notes, documents, file attachments, and associated persons including but not limited to relatives, children, attorneys, and collaterals.	
4.1.1.30	System must allow addresses to be United States Postal Service (USPS) validated.	
4.1.1.31	System must allow entry of foreign addresses and foreign characters.	
4.1.1.32	System must allow retention/display of photo images, audio and video files in their native format within contact records as needed.	
4.1.1.33	System must enable users to identity history of previous complaints involving a caller, person, or case.	
4.1.1.34	System must provide search capabilities to determine whether a caller, person, or case record exists to provide for a means to auto populate a new record if necessary.	
4.1.1.35	System must provide search feature to quickly locate provider and service records for efficient provision of information and referrals.	
4.1.1.36	System must provide capability for person and case specific alerts to be set by users, such as status indicators and validation messages, to provide feedback to users when accessing a record.	
4.1.1.37	System must support the full case management workflow enabling status labels (i.e., receive complaint, preliminary data collection, investigation in process, awaiting approval to close, etc.) and time tracking by status, workflow from initial contact to case closure.	
4.1.1.38	System must support documentation stored within a case, in all common formats including Portable Document Format (PDF), Word, Excel, Google Docs, Google Sheets, etc. and must be document-level searchable.	
4.1.1.39	System must support automated or manual assignment of a unique case identifier upon creation of a new case.	
4.1.1.40	System must provide a way to navigate a case summary	 <i>The case summary screen is</i>














		<i>integrated and easily accessible to case workers at all times while they navigate through case information.</i>
4.1.1.41	System must support correspondence production, including letter and email templates, that can be connected to workflows, can be auto populated with case or person specific data, and can be transmitted and timestamped.	 <p><i>The MTX solution has the ability to create correspondence in any format and can connect correspondence to workflows and even be taken a step further to automate the creation and distribution of any case correspondence, alleviating effort for caseworkers.</i></p>
4.1.1.42	System must support templates as form letters, fill in form letters, customized form letters, or custom letters and using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word.	
4.1.1.43	System must support the capability to create output in hard copy, paper letters, email, and social media/digital messaging.	
4.1.1.44	System must support the capability to set default printers for hard copy output.	
4.1.1.45	System must support the ability to generate outgoing correspondence to an individual, a group of individuals with similar characteristics, or to predefined distribution lists.	
4.1.1.46	System must alert users as new tasks and case assignments are made and have the ability to monitor summarized issues or task status, through a real time, user-personalized dashboard.	
4.1.1.47	System must support user addition of notes, complaints, inquiries, tasks, calls, and other vital data to person and case records in accordance with role-based security permissions that include view, add, edit, and delete levels of access.	
4.1.1.48	System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among and between users.	



4.1.1.49	System must provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.	 <i>Workflows are completely configurable and scalable to meet the need of FCO processes today and as growth and improvement happens in the future.</i>
4.1.1.50	System must allow agency to attach an actual or estimated cost per activity unit to all activities within the workflow to enable estimates of the activity cost of providing complete handling and investigatory services.	 <i>Cost per activity is fully supported and can be automated through configurable calculations based on hourly rates and time spent, providing FCO staff with holistic cost models.</i>
4.1.1.51	System must provide a history function with tracking tools allowing for a complete contact history and count for all phone calls, emails, postal mail entries, faxes, text messages, social media messages or other permitted or manually entered contacts to the system or case.	
4.1.1.52	System must include monitoring functionality allowing progress to be monitored and alerts and reminders generated when the workflow nears completion.	
4.1.1.53	System must provide alerts or visual cues for items requiring approvals.	
4.1.1.54	The public facing portal and established weblinks must include designated spaces that support administrator created content and the system must include the content management tools and access necessary to update the content and appearance.	
4.1.1.55	System must provide means for administrators to update the look and content of the public facing portal and the content of administrator-created content on associated web links.	
4.1.1.56	System must provide a public facing online portal with the option for consumer digital engagement tools (Short Message Service (SMS), live chat).	
4.1.1.57	System must provide a customizable web form incorporating a challenge response test such as Completely	

	Automated Public Turing test to tell Computers and Humans Apart (CAPTCHA).	
4.1.1.58	System must provide a public facing portal that enables modification of text size and other page appearance qualities to comply with Americans with Disabilities Act (ADA) standards for people with disabilities.	
4.1.1.59	System must support creation of a call record at the time of contact or after the fact.	
4.1.1.60	System must maintain creation time and dates on records and modifications and enable associated reporting on status of open and past due tasks and cases.	
4.1.1.61	System must enable data entry and tracking of information required for reporting, including but not limited to caller type, complaint method, complaint type, date, time, referral source, age, gender, race, custody status, agency, and worker contact efforts.	
4.1.1.62	System must enable administrative development of data field labels, data field characteristics, data field picklists.	 <i>As a highly configurable solution, FCO administrators will have control over the development of new and existing data field labels, characteristics, and picklists.</i>
4.1.1.63	System must enable users to search picklists using drop down menus and predictive texts.	
4.1.1.64	System must enable a public facing web form and a public use email to integrate and populate, as specified by the administrator, to contact, person, or case records to avoid duplication of data entry.	 <i>The MTX Solution offers a public facing web form that allows the public reporters to experience a guided walkthrough of the information needed, automating 80%+ of intake data and generating a case, all without FCO staff intervention. Email capture and automated case, contact, person creation is supported as well.</i>











4.1.1.65	System must allow full control of administrative tables without vendor assistance including but not limited to demographic fields, response types, and validation rules, designation, configuration, and characteristics of custom fields, designation of mandatory and optional fields, contact types and categories, note and document types and categories, places including counties, municipalities, towns, and zip codes, telephone types, definitions and content of picklists and user options within fields, categories and classifications, key performance indicators including targets, thresholds, and alerts, and file management and data retention.	 <p><i>Ombudsman administrators will have full control over the configuration of the case management solution without vendor assistance and will be able to configure all fields, workflows, KPIs, thresholds, alerts and file management and data retention. Additionally, FCO staff will have the ability to continue to implement automation within the system as thresholds, targets, and staff availability adjust moving forward.</i></p>
4.1.1.66	System must provide administrative tools allowing authorized users to configure screens, arrange fields, show, and hide fields, configure dropdown and picklists, define default and autofill values, and manage role-based security permissions without vendor/technical assistance.	
4.1.1.67	System must permit designation of federal holidays for business day versus calendar day calculations.	
4.1.1.68	System must allow automation of business practices of the agency and allows administrators to create workflows within the application.	 <p><i>The MTX Case Management solution was created to automate business practices, alleviating the burden of redundant tasks for FCO staff members, and can automate items like flagging cases as high priority, automating standardized correspondence, assigning cases to FCO staff based on current caseload and more.</i></p>
4.1.1.69	System must allow for the users to set a specific list of favorites including searches, templates, and contacts.	



4.1.1.70	System must provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditional highlighting for important variances to targets.	
4.1.1.71	System must provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and the level of detail required.	
4.1.1.72	System must provide for historical reports to show trends and comparisons between time periods.	
4.1.1.73	System must provide for generation and distribution of standard and ad hoc reports at regular intervals as set by users with role-defined permissions.	
4.1.1.74	System data and documents must be searchable to enable statistics and reports.	
4.1.1.75	System must provide a library of standard reports supporting common aspects of case management and investigatory practice.	
4.1.1.76	System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future like reports.	
4.1.1.77	System must provide standard user activity and history reports.	
4.1.1.78	System must allow standard and ad hoc reporting capability allowing users to query and extract data into viewable, exportable, and printable reports without assistance of the vendor or technical resources.	
4.1.1.79	System reporting engine must allow reporting against the full up-to-date transactional database ensuring that all data elements are available for inclusion or selection in reports.	
4.1.1.80	System reporting engine must allow report writers to create, publish, schedule, and distribute standard and ad hoc reports in varying formats including graphs and charts.	
4.1.1.81	System must provide a web-based application interface compatible with recent and current versions of Internet Explorer, Microsoft Edge, Google Chrome, Firefox, Apple Safari, brand name or equal.	
4.1.1.82	System must provide for single sign on authentication.	

		<p><i>Single sign on is fully supported for any SSO provider and MTX can integrate with existing directories (Google, Active Directory, etc).</i></p>
4.1.1.83	<p>Vendor must make available and implement upgrades, enhancement, and error corrections at no additional charge when such upgrades, enhancement, and error corrections are generally made available to its other clients at no additional charge.</p>	
4.1.1.84	<p>Application and Data must be backed up to a second secure data center that is 100 air miles from the primary site to make it highly unlikely that both data centers would be compromised from a single disaster whether natural or manmade.</p>	
4.1.1.85	<p>For any system failure, the application must be restored at either the primary location or the back-up location within 24-hours.</p>	<p><i>Salesforce is a service provider, and your organization would be one of hundreds of thousands of customers using the service. Salesforce utilizes one disaster recovery process for all customers. For business continuity purposes, Salesforce supports disaster recovery with a dedicated team and a 4 hour recovery point objective (RPO) and 12 hour recovery time objective (RTO).</i></p> <p><i>Salesforce offers multiple layers of redundancy, so that many failures may be recovered in seconds or minutes. Not all disruptions are declared. Salesforce's RPO number is for when a data center is unavailable. Since data is replicated between data centers, backups are only used should the primary recovery mechanism fail.</i></p>







## Performance Technical Requirements

#	Requirement	Compliant?
4.1.2.1	Vendor will provide monthly reports documenting DOWNTIME based on the following definitions: Downtime is defined as the time during which any component(s) of the solution is not functioning or available for any reason. Production downtime is the time during which the solution is not available for intended use in production. There are two types of downtime. Scheduled Downtime: any period of time that solution, or any component(s) of the solution, is unavailable for its intended use that have been reviewed and approved in advance of the service interruption. Scheduled Downtime that has received approval from the Foster Care Ombudsman's Office does not count toward downtime performance standards. Unscheduled Downtime: any period of time that the solution, or any component(s) of the solution, is unavailable for its intended use that has not been approved by the State in advance of the service interruption.	 <p><i>Salesforce downtime and maintenance is viewable at <a href="https://status.salesforce.com/products/Salesforce_Services">https://status.salesforce.com/products/Salesforce_Services</a></i></p>
4.1.2.2	In any month that Unscheduled Downtime reaches 1% or greater, the monthly invoice for Software Licenses will be reduced by 2.5%.	
4.1.2.3	Vendor will provide monthly reports, due by the second business day of each month for the previous month, by email, of System Availability.	
4.1.2.4	System Availability is based on Hours of Operation – the Case Management System shall be accessible 99% of the time during working hours and at least 80% of other hours, excluding agreed upon and scheduled downtime. The Foster Care Ombudsman's Office defines working hours as: 7:00 a.m. to 7:00 p.m. Eastern Standard Time, Monday through Friday. 7:00 a.m. to 6:00 p.m. Eastern Standard Time, on Saturday, Sunday, and Federal Holidays	
4.1.2.5	In any month that System Availability falls below the thresholds defined in specification 4.1.2.4, the monthly invoice for Software licenses will be reduced by 2.5%.	 <p><i>License terms are set between Salesforce, Carahsoft, and the State of Virginia. See licensing quote and <a href="#">Premier Success Plan</a> for more information regarding support and availability.</i></p>
4.1.2.6	Solution Performance is defined as the time it takes for the	

	<p>solution to complete actions initiated by a system user. The vendor is expected to be responsible for that portion of the solution and communication link for which the vendor has control. For system response time performance measures, control is defined as any vendor/subcontractor owned or administered service or component up to and including the State-side of the router(s). The vendor shall provide a solution to monitor and report on the response times defined below and shall provide a monthly report, due by the second business day of each month for the previous month, by email, to the Foster Care Ombudsman's Office. All standards shall be measured and reported in seconds.</p>	 <p><i>Salesforce performance measure reports are viewable at <a href="https://status.salesforce.com/products/Salesforce_Services">https://status.salesforce.com/products/Salesforce_Services</a></i></p>
4.1.2.7	<p>Performance Standards – the vendor must ensure system performance meets the following performance standards.  Menus: The response time must be within four seconds for 95% of all these transactions.  Simple Inquiries: The response time must be within six seconds for 95% of all these transactions. A simple inquiry is one that contains three or fewer criteria.  Complex Inquiries: The response time must be within 10 seconds for 95% of these transactions. A complex inquiry is one that contains four or more criteria.  Simple Updates: The response time must be within 14 seconds for 95% of all these transactions. A Simple Update is one that modifies a single system or database.  Complex Updates: The response time must be within 20 seconds for 95% of all these transactions. A Complex Update is one that modifies multiple systems or databases.</p>	
4.1.2.8	<p>For months in which any of the performance standards are not met, the monthly invoice for software licenses will be reduced by 1% for each unmet standard for a total reduction of up to 5%.</p>	 <p><i>License and platform support terms are set between Salesforce, Carahsoft, and the State of Virginia. See licensing quote and <a href="#">Premier Success Plan</a> for more information regarding support and availability.</i></p>
4.1.2.9	<p>Operation Issue Management – Once an operational system has been delivered, the vendor shall categorize and resolve errors within 10 business days.  Critical Business Impact: Indicates the enterprise solution is unavailable for its intended use, resulting in a stoppage of operations and loss of functional application. Requires immediate notification by phone and email and a resolution</p>	 <p><i>License and platform support</i></p>

	<p>within two hours.</p> <p>Serious Business Impact: Indicates serious production issues where the enterprise solution is useable but severely limited and no workarounds exist. Requires immediate notification by phone and email and a resolution within 24 hours.</p> <p>Significant Business Impact: indicates moderate production issues where the enterprise solution is usable, but a workaround is available. Requires immediate notification by phone and email and a resolution within 72 hours.</p> <p>Minimal Business Impact: Indicates the problem results in little impact on operations or reasonable circumvention to the problem has been implemented. Requires immediate notification, by phone and email and resolution must be within 10 business days.</p>	<p><i>terms are set between Salesforce, Carahsoft, and the State of Virginia. See licensing quote and <a href="#">Premier Success Plan</a> for more information regarding support and availability.</i></p>
4.1.2.10	<p>For months in which Operations Issue Management standards are not met, the monthly invoice for software licenses may be reduced as follows: Failure to meet Serious Business Impact Standard - 1.5%. Failure to meet Significant Business Impact Standard – 1%. Failure to meet Minimal Business Impact Standard -0.5%.</p>	 <p><i>License and platform support terms are set between Salesforce, Carahsoft, and the State of Virginia. See licensing quote and <a href="#">Premier Success Plan</a> for more information regarding support and availability.</i></p>
4.1.2.11	<p>Data updates are to be defined as the activities necessary to maintain current and accurate data as required to conduct the functions outlined in compliance with all requirements herein. The vendor shall ensure database update activities meet the following performance standards.</p> <p>Error Resolution Turnaround Time: Resolve database errors reported by the Foster Care Ombudsman's Office within two business days or error detection.</p> <p>Daily Back-ups: Complete daily backups before the start of business based on the solution availability defined in Specifications 4.1.2.1 through 4.1.2.4.</p> <p>Monthly Back-ups: Complete the monthly backups by the second business day of the month following the month to be backed up.</p> <p>Data Fixes: All data fixes must be implemented within 24 hours, unless otherwise specified.</p>	 <p><i>License and platform support terms are set between Salesforce, Carahsoft, and the State of Virginia. See licensing quote and <a href="#">Premier Success Plan</a> for more information regarding support and availability.</i></p>
4.1.2.12	<p>For months in which Database Update standards are not met, the monthly invoice for software licenses may be reduced as follows:</p> <ul style="list-style-type: none"> <li>• Any one standard not met – 1%.</li> </ul>	



	<ul style="list-style-type: none"> <li>• Any two standards not met – 2%.</li> <li>• Any three standards not met – 3%</li> </ul>	
4.1.2.13	Technical Support - The vendor must provide technical support for State users who report technical problems, assist with problem analysis, and provide instructions for troubleshooting problems. After-hours, the vendor must provide electronic call answering via a toll-free phone line for callers to leave messages.	
4.1.2.14	Tracking of Support Inquiries: The vendor shall manage, track, and report on technical support services via multiple channels, including telephone, client portal, email, and mail. The vendor shall provide an integrated contact management system that tracks and manages user contacts from all channels and provides reporting on user contact metrics based on user-defined queries.	
4.1.2.15	State User Technical Support: The vendor's solution for technical support for State users is to be available Monday through Friday from 7:00 a.m. to 7:00 p.m. Eastern Standard Time, excluding State Holidays or any other day State offices close, and on an emergency basis as requested by the State. The vendor must provide an after-hours contact for technical support during all non business hours seven (7) days a week, 365 days a year. The after hours contact must respond to all verbal (telephone) inquiries from State staff within two hours of receipt.	
4.1.2.16	Client User Technical Support: The vendor's solution for client technical support must be available Monday through Friday from 7:00 a.m. to 7:00 p.m. Eastern Standard Time. The vendor's staff must return all after-hours calls on the next business day in the caller's preferred language or through the use of oral interpretation services.	
4.1.2.17	Performance Standards: The vendor is to ensure user support meets the following performance standards: Average speed of Answer - At least 90% of all calls are to be answered within 30 seconds (or within three rings), where "answer" means the amount of time it takes for an	 <i>License and platform support</i>



<p>automated system to answer the call.</p> <p>On Hold Time: On hold time is to be less than two minutes for at least 90% of all calls, where on hold time is defined as the time (in seconds) elapsed before response by a live representative (excludes speed of answer time).</p> <p>The rate of abandoned calls must not exceed 5% measured each month. The definition of abandoned calls is the total number of all calls abandoned before reaching a live voice plus the number of blocked calls (received by a busy signal) divided by the total number of calls received regardless of source or reason.</p> <p>State After-hours Support Phone Inquiry Response Timeliness: Respond to 95% of verbal (telephone) inquiries within two hours of receipt.</p> <p>Client After-hours Support Phone Inquiry Response Timeliness: Respond to 95% of verbal (telephone) inquiries on the next business day in the caller's preferred language or through the use of oral interpretation services.</p> <p>State and Client Written and Email inquiry Response Timeliness: Respond to at least 90% of written and emailed correspondence tied to user technical support within one business days of receipt.</p> <p>For months in which Technical Support standards are not met, the monthly invoice for software issues may be reduced by 1% for each standard that is not met.</p>	<p><i>terms are set between Salesforce, Carahsoft, and the State of Virginia. See licensing quote and <a href="#">Premier Success Plan</a> for more information regarding support and availability.</i></p>
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**ADDITIONAL INFORMATION**

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR AN ENTERPRISE LEVEL, CLOUD-BASED, STATEWIDE CASE MANAGEMENT SYSTEM PER THE ATTACHED DOCUMENTS.

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

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Enterprise system management software				

Comm Code	Manufacturer	Specification	Model #
43232304			

**Extended Description:**  
Phase 1 - pre-operational

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Computer software licensing service				

Comm Code	Manufacturer	Specification	Model #
81112501			

**Extended Description:**  
Software Licensing Fees

INVOICE TO	SHIP TO
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HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV US
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Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Database management system software maintenance				

Comm Code	Manufacturer	Specification	Model #
81112205			

**Extended Description:**  
 Modifications and Enhancements, Support

SCHEDULE OF EVENTS
--------------------

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	VENDOR QUESTION DEADLINE	2021-08-03

**SOLICITATION NUMBER:** CRFQ HHR2200000001  
**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 answers to vendor questions

No other changes

Bid opening remains August 19, 2021 at 1:30 PM ET

**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.



# ATTACHMENT A

**CRFQ HHR2200000001**

**Addendum 1-Answers to Vendor Questions**

**Question #1: Whether companies from Outside USA can apply for this (like, from India or Canada)?**

**Answer #1: Yes**

**Question #2: Whether we need to come over there for meetings?**

**Answer #2: No**

**Question #3: Can we perform the tasks (related to RFP outside USA (like, from India or Canada)?**

**Answer #3: Yes**

**Question #4: Can we submit the proposals via email?**

**Answer #4: Read section 6 Bid Submission on the Instructions to Vendors Submitting Bids for appropriate methods on submitting a response.**

**Question #5: How many licenses are in this proposal so we can make an accurate bid?**

**Answer #5: This will vary as we are a new unit. Minimum is 10 and anticipated maximum is 50.**

**Question #6: Are you looking for solely a whole contact amount or a per unit amount?**

**Answer #6: Prefer pricing that is scalable for growth.**

**Question #7: What Solution is currently being used? Also, is the contact amount listed the one that is currently being used?**

**Answer #7: This is a new system for the Foster Care Ombudsman Unit.**

**Question #8: How many user licenses will be needed for this deployment?**

**Answer #8: The minimum number of users is 10 and the anticipated maximum is 50.**

**Question #9: Will there be phased-in user growth beyond the initial implementation?**

**CRFQ HHR220000001**  
**Addendum 1-Answers to Vendor Questions**

**Answer #9:** This system must be scalable for growth.

**Question #10: Can you please provide the budget detail?**

**Answer #10:** The State of West Virginia does not disclose budget information.

**Question #11: Can you please provide the number of users?**

**Answer #11:** The minimum number of users is 10 and the anticipated maximum is 50. This system must be scalable for growth.

**Question #12: Can you please provide the previous awarded incumbent, if any?**

**Answer #12:** The Foster Care Ombudsman unit does not currently utilize an incumbent case management system.

**Question #13: Does the department use Outlook or Gmail for email?**

**Answer #13:** Gmail within Google Workspace

**Question #14: Does the department use Microsoft Office or Google Docs for documents?**

**Answer #14:** Google Docs within Google Workspace

**Question #15: Does the department have a current database and if so will that data need to be converted into the new system?**

**Answer #15:** Data is maintained presently in Excel and the Foster Care Ombudsman desires that the information captured in Excel be integrated to the new case management system.

**Question #16: Although we are browser based and a COTS case management software package we do not provide the hosting service directly. Our software is browser based and can be installed on premise in your data center or in the Cloud with a third party hosting vendor such as Azure, AWS, Rackspace, etc. selected and controlled 100% by your IT department. Is this an acceptable deployment of our case management solution for your RFP or are you looking to the vendor to host the environment?**

**Answer #16:** The Foster Care Ombudsman is looking for a vendor to host the environment.

**Question #17: Do you currently use a web form to capture the intake data and if so can you share the fields that are captured?**

**Answer #17:** The Foster Care Ombudsman does not use a webform but desires to add this feature.

**Question #18: How many users will need access to the system?**

**Answer #18:** The minimum number of users is 10 and the anticipated maximum number is 50. This system must be scalable for growth.

**Question #19: What does DHHR currently use for their case management system?**

**Answer #19:** None, data collection is handled by the Foster Care Ombudsman in Excel.

**Question #20: Currently, how many users are on the existing case management system?**

**Answer #20:** The Foster Care Ombudsman currently has seven staff members, but staffing levels are growing.

**Question #21: What is the average number of cases that are handled by DHHR within a month/quarter?**

**Answer #21:** The Foster Care Ombudsman is a new office, and any average presently is of limited value, but the current open cases count is approximately 85.

**Question #22: Does DHHR have seasonal spikes or increases in case volumes? If so, please provide the average number of cases during those spikes.**

**Answer #22:** The Foster Care Ombudsman is a new office and seasonal and other variations to case volumes are not yet known.

**Question #23: Does the agency provide its citizens/constituents with a contact or call center?**

**Answer #23:** Complainants can contact the Foster Care Ombudsman office presently by email, telephone, fax, scheduled appointment, and postal mail. A call center approach will be evaluated based on contact volumes and optimum distribution of workloads.

**CRFQ HHR220000001**

**Addendum 1-Answers to Vendor Questions**

**Question #24: What are the Agency's security protocol and procedures? Please provide a reference document and/or link.**

**Answer #24:** The Foster Care Ombudsman is positioned within the WV DHHR Office of Inspector General. Access to premises, messages, documents, staff, and data are strictly controlled.

**Question #25: Will WV citizens have the ability to upload photo image, audio and video files to DHHR?**

**Answer #25:** The Foster Care Ombudsman would envision this available to complainants. Presently information is provided to the Foster Care Ombudsman by telephone, email, fax, by scheduled appointment, and postal mail.

**Question #26: The requirement for the case processor is acknowledged. However, would DHHR also desire for proactive notifications (SMS, Email, Agentless voice) to be sent to citizens/constituents/claimants as their case enters or finishes status (e.g., receive complaint, preliminary data collection, investigation in process, awaiting approval to close, etc.). This can assist in the reduction of inbound calls/digital inquiries about case status.**

**Answer #26:** Yes, the Foster Care Ombudsman would examine solutions to provide limited outbound case progress/status information to complainants.

**Question #27: Approximately how many emails are processed within a month?**

**Answer #27:** This information is not presently available.

**Question #28: Can the department provide examples of the templates used for form letters, fill in form letters, customized form letters or custom letters?**

**Answer #28:** This information is not presently available given the new status of the Foster Care Ombudsman unit.

**Question #29: What does the department currently utilize to capture the cost per activity unit to all activities within the workflow? E.g., Business intelligence tool**

**Answer #29:** The Foster Care Ombudsman currently does not engage a tool to capture cost per activity.

**Question #30: Does the department currently own an SMS number? If so, how many?**

**Answer #30:** The Foster Care Ombudsman does not currently own an SMS number.

**Question #31:** If not, does the department require a short or long code SMS number?

**Answer #31:** That is to be determined.

**Question #32:** Please define “predictive texts.”

**Answer #32:** Predictive text is the text that is provided by the technology in an anticipatory fashion, which may be accepted or rejected by the user. It is designed to reduce common keystrokes when producing narrative text within a document or field.

**Question #33:** Is the department looking for a Workforce Management solution? This can assist with the scheduling of agents throughout the year and associated federal holidays.

**Answer #33:** The Foster Care Ombudsman would have interest in workforce management solutions.

**Question #34:** Can the department provide a list of the workflow processes that support the existing business practices to the department?

**Answer #34:** This information is not presently available given the new status of the Foster Care Ombudsman.

**Question #35:** What are some examples of “standard reports and graphics” that the department is requesting?

**Answer #35:** The Foster Care Ombudsman is required to establish and maintain a statewide uniform reporting system to collect and analyze data relating to complaints for the purpose of identifying and resolving significant problems, which includes but is not limited to sorting, filtering, analyzing, and presenting complaints data/information qualitatively and quantitatively by type, location, findings, recommendations, observations, agencies, roles, and various other complaint attributes.

**Question #36:** What type of Single Sign On (SSO) does the department currently use?

**Answer #36:** We are withdrawing the requirement for Single Sign On (specification 4.1.1.82).



**CRFQ HHR2200000001**

**Addendum 1-Answers to Vendor Questions**

**Question #37: If one is not currently in use, has the department selected an application at this time or does the department want the responding vendor to provide the SSO application?**

**Answer #37:** We are withdrawing the requirement for Single Sign On (specification 4.1.1.82).

**Question #38: The following link does not work:**

**<https://www.state.wv.us/admi%20n/purchase/privacy/default.html> “404 - File or directory not found. The resource you are looking for might have been removed, had its name changed, or is temporarily unavailable.”**

**Answer #38:** <http://www.state.wv.us/admin/purchase/privacy/default.html>

**Question #39: Can you please provide an estimated budget for the 1-year Contract (Implementation + Support)?**

**Answer #39:** The State of West Virginia does not provide budget information.

**Question #40: Can you please provide the total users of this system (internal and external split) and expected minimum users per month?**

**Answer #40:** The minimum number of users is 10 and the anticipated maximum is 50. This system must be scalable for growth.

**Question #41: RFP Section 3.1 (pg 26) - “Vendor must have completed a minimum of five systems for other states.” Can you please clarify if Agency will consider the multi-system experience in a single state against the count (of five)?**

**Answer #41:** If the vendor has sold systems to two or more agencies in a State each of those systems could be counted as a completed system. If, on the other hand, the vendor has sold a single system to two or more agencies with similar needs who are sharing the expense it is still a single system and would count as only one of the required five.

**Question #42: RFP Section 3.4 (pg 26) refers to “Vendor must provide contact information including contact name, phone number and email address of a director of a state Foster Care Ombudsman program where they have successfully installed and supported an Enterprise level, Cloud-based statewide case management system.” Is Vendor expected to have installed & supported the Case management system in the Foster Care Ombudsman program? Or any Case Management experience in Health & Human Services suffices?**

**CRFQ HHR2200000001**

**Addendum 1-Answers to Vendor Questions**

**Answer #42:** We are seeking to work with a vendor who has provided a case management system to an ombudsman program, or a program devoted to independent and impartial investigation of concerns and complaints. Foster Care Ombudsman programs have varying titles in other states, i.e., Child Advocate, Foster Child Ombudsman, Resource Parent Ombudsman, Foster Parent Ombudsman, etc.

**Question #43: RFP Section 4.1.1.1 (pg 26) Can you please confirm the warranty period?**

**Answer #43:** Section 4.1.1.1 as referenced in this question refers to how soon meetings will occur with staff. There is no reference to warranty.

**Question #44: Attachment A. During Operation Phase, Can you please confirm if the SaaS license and Vendor Technical support costs be given separately?**

**Answer #44:** We have Commodity Lines for the project, Software Licensing Fees, and Modifications and Enhancements/Support.

**Question #45: RFP Section 5 Contract award and Page #42: Is there a cost sheet format for us to submit?**

**Answer #45:** We have Commodity Lines in WVOasis for the project, Software Licensing Fees, and Modifications and Enhancements/Support. Pricing should be included on the Commodity Lines.

**Question #46: Bid Submission - Page #5. Is there any Technical response format and any pages limit for response document?**

**Answer #46:** No, the Request for Quotation procurement method does not require a technical response, the contract award is based on lowest bid meeting specifications.

**Question #47: How many users do you anticipate initially?**

**Answer #47:** A minimum of 10 and an anticipated maximum of 50. The system must be scalable for growth, as the Foster Care Ombudsman unit is new in state government.

**Question #48: What is the expected or average number of complaints and cases per year?**

**Answer #48:** This is a new program, and the volume is very difficult to predict but is anticipated over 1,000 complaints annually at minimum with potential to grow fivefold or greater.

**CRFQ HHR220000001**  
**Addendum 1-Answers to Vendor Questions**

**Question #49: How many documents/photo/audio/video files do you estimate will need to be captured? It would be helpful for estimates per case, per month, per year, and if known the sizes including total volume (GB or TB).**

**Answer #49:** This is a new program, and it is not possible to estimate at this time.

**Question #50: Does the reference to live chat on the public portal anticipate a service staffed by Ombudsman staff or are you seeking automation such as a chatbot?**

**Answer #50:** The program would anticipate using both staff and chatbot technology.

**Question #51: What is the source of user identity that is preferred for single sign on? For example, do all users who will need to authenticate have Google accounts or Active Director Accounts or similar?**

**Answer #51:** We are withdrawing the requirement for Single Sign On (specification 4.1.1.82).

**Question #52: Is offline capture and sync a desired feature?**

**Answer #52:** Yes.

**Question #53: Has the Agency recently performed any business process reengineering (BPR) initiatives related to its foster care processes? Or will that take place as part of the system design and implementation?**

**Answer #53:** Business processes and workflows will be a part of system design, configuration, and implementation.

**Question #54: When is the proposed start date for this project? Is there a preferred date to have the system live? How long does the Agency expect this project to last?**

**Answer #54:** The award date is dependent on when the agency completes their evaluation of all bids received.

**Question #55: Does the state have any preferred or existing cloud provider(s)?**

**CRFQ HHR2200000001**

**Addendum 1-Answers to Vendor Questions**

**Answer #55:** No. The State requires that the system be hosted in a Tier 3 or Tier 4 data center with privacy and security provisions in place that are at least as strict as HIPAA and NIST SP 800-53, Rev. 5.

**Question #56:** Please provide any specific security requirements for the hosting environment.

**Answer #56:** The State requires that the system be hosted in a Tier 3 or Tier 4 data center with privacy and security provisions in place that are at least as strict as HIPAA and NIST SP 800-53, Rev. 5.

**Question #57:** Please provide any specific analytic functionality requirements for this system.

**Answer #57:** Capability for systematic computational analysis of complaints, contacts, and cases data and statistics is required.

**Question #58:** Please provide any specific data visualization functionality requirements for this system.

**Answer #58:** Visual representations of data and reports to include graphs, charts, and dashboards is required.

**Question #59:** Is there any existing data that needs to be migrated to the new system?

**Answer #59:** Yes, from Excel and Google Sheets.

**Question #60:** Are there any data retention requirements for the vendor to keep the data for certain amount of time after the program is retired? If so, how long should the data be retained?

**Answer #60:** All of the data in the system is and remains the property of WV DHHR and must be provided to the Office of the Foster Care Ombudsman upon termination of the contract, termination of the program, or upon request of WV DHHR at any time during the life of the contract. Data shall be made available in a SQL format or other agreed upon database format and transfer of the data shall be via Secure File Transfer Protocol or other mutually agreed upon secure transfer method.

**Question #61:** Is there any post support training desired?

**CRFQ HHR2200000001**

**Addendum 1-Answers to Vendor Questions**

**Answer #61:** Yes, as it relates to new or changing features or functionalities of the system, or as it relates to identified user needs with the existing system.

**Question #62:** Please elaborate on the system integration requirements. How many existing systems will the new case management system have to integrate with?

**Answer #62:** None.

**Question #63:** What is the internal user count of people within WVDHHR who would need direct access to the system?

**Answer #63:** A minimum of 10 and an anticipated maximum of 50. The system must be scalable for growth, as the Foster Care Ombudsman unit is new in state government.

**Question #64:** Are there external users you anticipate accessing the system throughout the year? If so, what does that user count look like?

**Answer #64:** This is a new program and use by external users is difficult to estimate at this time.

**Question #65:** Is it possible for an extension on the due date of this RFQ?

**Answer #65:** Bids are due by August 19 at 1:30 PM ET, this date will remain as is

**Question #66:** Is the vendor able to provide a reference for a similar use case or other Foster Care opportunities they have successfully implemented? Is there an exception to this?

**Answer #66:** The reference must be for a use case or other foster care opportunities performing the same core functions as a foster care ombudsman program.

**Question #67:** Will the public facing portal allow direct external access for the purpose of securely filing complaints or checking on the status of existing complaints?

**Answer #67:** Yes.

**Question #68:** Will it be acceptable to discuss remedies during contract negotiations?

**CRFQ HHR2200000001**

**Addendum 1-Answers to Vendor Questions**

**Answer #68:** There are no contract negotiations for a Request for Quotation, award is based on lowest bid meeting all mandatory requirements.

**Question #69: Does WV DHHR have to meet certain regulatory requirements like FedRAMP?**

**Answer #69:** The State requires that the system be hosted in a Tier 3 or Tier 4 data center with privacy and security provisions in place that are at least as strict as HIPAA and NIST SP 800-53, Rev. 5.

**Question #70: We have a Named User licensing structure. We define Named Users as “staff with access to the back-office Software regardless of whether such access is concurrent or consecutive.” Based on this definition, how many Named Users does the agency anticipate having on its new system?**

**Answer #70:** A minimum of 10 and an anticipated maximum of 50. The system must be scalable for growth, as the Foster Care Ombudsman unit is new in state government.

**Question #71: What is the budget for this project? If all cost proposals come in above a certain amount, would this RFP be cancelled? What is that amount? Did the legislature allocate any funds specifically for this project? If so, what is the amount allocated, and when does it need to be used?**

**Answer #71:** The State of West Virginia does not release budget information.

**Question #72: Can the State provide a non-scanned version of the RFP to assist vendors in duplicating the requirements for their response?**

**Answer #72:** A non-scanned version of the solicitation will not be provided. The solicitation is a Request for Quotation, not a Request for Proposal. The contract award will be based on lowest bid meeting all mandatory requirements.

**Question #73: Requirement 4.1.2.15: For non-critical issues, we utilize a ticket management system that utilizes a web portal to submit issues. Our typical process includes the review, correction and testing of issues over the course of several days, including a client review stage. As a result, we typically respond to issues within the first 24 hours of a ticket being submitted. Would this method of support be sufficient to meet the requirements of the RFP, or would support methods be expected to conform to the State’s requirements?**

**Answer #73:** Support methods would be expected to conform to the State’s requirements.



**CRFQ HHR220000001**  
**Addendum 1-Answers to Vendor Questions**

**Question #74: Requirement 4.1.2.16 discusses client user technical support: is this intended to support clients of the State?**

**Answer #74:** Support methods would be expected to conform to the State's requirements.

**Question #75: There is no apparent requirement for a technical proposal or statement of work required with the Request for Quotation. Should the vendor simply redline the RFQ with suggested exceptions and attach that to the quote in the WVoasis system?**

**Answer #75:** A vendor must meet all mandatory requirements of the Request for Quotation. By signing and submitting the bid, or by submitting it electronically through WVOasis, a vendor is confirming that they meet all mandatory requirements. Request for Quotations are awarded to the vendor that provides the lowest bid that meets all mandatory specifications, technical proposals are not required for this type of procurement method.

**Question #76: Please identify all required attachments to the quote. For example, is a certificate of insurance required with the submission of the vendor's quote? What other forms/submissions are expected/required for submission with the quote?**

**Answer #76:** All required documents to be submitted with the bid are listed within the Request for Quotation.

**Question #77: Please provide budget information for this project. According to the State of West Virginia Supplemental Budget Requests for FY2021 (found at [https://www.wvlegislature.gov/legisdocs/reports/budget/Supplemental Appropriation Requests FY21.pdf](https://www.wvlegislature.gov/legisdocs/reports/budget/Supplemental_Appropriation_Requests_FY21.pdf)), "[a] computerized case tracking system must also be purchased (initial cost is \$75,000 and ongoing cost of \$55,000 for user license fees, hosting services and system maintenance and support)." Is this the budget for this project? If not, please provide accurate figures. Does the State anticipate the use of federal matching funds to enhance these amounts?**

**Answer #77:** The State of West Virginia does not release budget information.

**Question #78: Several of the requirements describe a "public-facing portal." Can the State please provide more details as to the envisioned purpose of this portal (specific use case) and how the State envisions that integrate with the desired case management system?**

**Answer #78:** The state/program anticipates a website that is equipped with a user-friendly webform to which citizens can enter complaints or comments. The information keyed to the webform should flow directly into the case management system to alleviate redundant keying of data by program staff.

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: HHR220000001**

**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.

MTX Group, Inc.

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Company

*Das Nobel, CEO*

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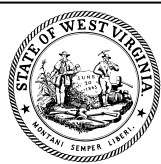
Authorized Signature

08/19/2021

---

Date

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



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

State of West Virginia  
 Centralized Request for Quote  
 Info Technology

<b>Proc Folder:</b> 909208		<b>Reason for Modification:</b>	
<b>Doc Description:</b> STATEWIDE CASE MANAGEMENT SYSTEM		ADDENDUM 1 TO PROVIDE ANSWERS TO VENDOR QUESTIONS	
<b>Proc Type:</b> Central Master Agreement			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2021-08-09	2021-08-19 13:30	CRFQ 0511 HHR2200000001	2

**BID RECEIVING LOCATION**

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

**VENDOR**

**Vendor Customer Code:** VS0000025838  
**Vendor Name :** MTX Group, Inc.  
**Address :** 6303  
**Street :** Cowboys Way, #40  
**City :** Frisco  
**State :** Texas **Country :** United States **Zip :** 75034  
**Principal Contact :** Kevin Locke, Account Executive  
**Vendor Contact Phone:** (732) 570-1475 **Extension:**

**FOR INFORMATION CONTACT THE BUYER**

Crystal G Hustead  
 (304) 558-2402  
 crystal.g.hustead@wv.gov

**Vendor Signature X** *Das Nobel*, CEO **FEIN#** 82-4828973 **DATE** 08/19/2021

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

**ADDITIONAL INFORMATION**

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR AN ENTERPRISE LEVEL, CLOUD-BASED, STATEWIDE CASE MANAGEMENT SYSTEM PER THE ATTACHED DOCUMENTS.

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INVOICE TO	SHIP TO
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HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV US	HEALTH AND HUMAN RESOURCES OFFICE OF INSPECTOR GENERAL 1900 KANAWHA BLVD E, BLDG 6 RM 817-B CHARLESTON WV US
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Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Database management system software maintenance				

Comm Code	Manufacturer	Specification	Model #
81112205			

**Extended Description:**  
 Modifications and Enhancements, Support

SCHEDULE OF EVENTS
--------------------

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	VENDOR QUESTION DEADLINE	2021-08-03

	Document Phase	Document Description	Page
HHR220000001	Final	STATEWIDE CASE MANAGEMENT SYSTEM	4

**ADDITIONAL TERMS AND CONDITIONS**

See attached document(s) for additional Terms and Conditions





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

State of West Virginia  
 Centralized Request for Quote  
 Info Technology

<b>Proc Folder:</b> 909208		<b>Reason for Modification:</b>	
<b>Doc Description:</b> STATEWIDE CASE MANAGEMENT SYSTEM			
<b>Proc Type:</b> Central Master Agreement			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2021-07-27	2021-08-19 13:30	CRFQ 0511 HHR2200000001	1

**BID RECEIVING LOCATION**

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

**VENDOR**

**Vendor Customer Code:** VS0000025838  
**Vendor Name :** MTX Group , Inc.  
**Address :** 6303  
**Street :** Cowboys Way #40  
**City :** Frisco  
**State :** Texas **Country :** United States **Zip :** 75034  
**Principal Contact :** Kevin Locke, Account Executive  
**Vendor Contact Phone:** (732) 570-1475 **Extension:**

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

**Vendor Signature X** *Kevin Locke*, Account Executive **FEIN#** 82-4828973 **DATE** 08/19/2021

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

**DESIGNATED CONTACT:** Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Kevin Locke, Account Executive  
\_\_\_\_\_  
(Name, Title)  
Kevin Locke, Account Executive  
\_\_\_\_\_  
(Printed Name and Title) 1450 Western Ave, Suite 304, Albany, NY 12203  
\_\_\_\_\_  
(Address) (732) 570-1475  
\_\_\_\_\_  
(Phone Number) / (Fax Number) kevin.locke@mtxb2b.com  
\_\_\_\_\_  
(email address)

**CERTIFICATION AND SIGNATURE:** By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

*By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.*

MTX Group, Inc.

\_\_\_\_\_  
(Company)

*Das Nobel, CEO*

\_\_\_\_\_  
(Authorized Signature) (Representative Name, Title)

Das Nobel, CEO

\_\_\_\_\_  
(Printed Name and Title of Authorized Representative)

08/19/2021

\_\_\_\_\_  
(Date)

1-800-886-7118

\_\_\_\_\_  
(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM  
SOLICITATION NO.: CRFQ HHR220000001

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.

MTX Group, Inc.

Company

*Das Nobel*

Authorized Signature

08/19/2021

Date

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

**REQUEST FOR QUOTATION**  
**CRFQ HHR2200000001**  
**Enterprise level-Cloud Based Statewide Case Management System**

**10.1.4.** Failure to remedy deficient performance upon request.

**10.2.** The following remedies shall be available to Agency upon default.

**10.2.1.** Immediate cancellation of the Contract.

**10.2.2.** Immediate cancellation of one or more release orders issued under this Contract.

**10.2.3.** Any other remedies available in law or equity.

**11. MISCELLANEOUS:**

**11.1. Contract Manager:** During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

**Contract Manager:** Kevin Locke

**Telephone Number:** (732) 570-1475

**Fax Number:** N/A

**Email Address:** Kevin.Locke@mtxb2b.com

**West Virginia Ethics Commission**  
**Disclosure of Interested Parties to Contracts**

(Required by *W. Va. Code* § 6D-1-2)

**Name of Contracting Business Entity:** MTX Group, Inc. **Address:** 6303 Cowboys Way, #40, Frisco, TX 75034

**Name of Authorized Agent:** Kevin Locke **Address:** 6303 Cowboys Way, #40 Frisco, TX 75034

**Contract Number:** CRFQ 0511 HHR2200000001 **Contract Description:** State-Wide Case Management System

**Governmental agency awarding contract:** Department of Health and Human Resources, Foster Care Ombudsman

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.

**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: Kevin Locke, Account Executive Date Signed: 08/19/2021

**Notary Verification**

State of Texas, County of Denton:

I, Kevin Locke, 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 19 day of August, 2021.

David Dawson

Notary Public's Signature

**To be completed by State Agency:**

Date Received by State Agency: \_\_\_\_\_

Date submitted to Ethics Commission: \_\_\_\_\_

Governmental agency submitting Disclosure: \_\_\_\_\_

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 exceed 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: MTX Group, Inc.

Authorized Signature: Das Nobel, CEO Date: 08/19/2021

State of Texas

County of Denton County, to-wit:

Taken, subscribed, and sworn to before me this 19 day of August, 2021.

My Commission expires April 26, 2022.

**AFFIX SEAL HERE**

**NOTARY PUBLIC** Sonia Wynne Dawson

