



The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at wvOASIS.gov. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at WVPurchasing.gov with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header 6

List View

- General Information**
- Contact
- Default Values
- Discount
- Document Information
- Clarification Request

Procurement Folder: 1228506

Procurement Type: Central Master Agreement

Vendor ID: VS0000043397

Legal Name: IntegRhythm Inc.

Alias/DBA: INRY

Total Bid: \$339,342.96

Response Date: 06/29/2023

Response Time: 12:56

Responded By User ID: Integrhythm

First Name: Pranav

Last Name: Rajguru

Email: fa@inry.com

Phone: 8850021914

SO Doc Code: CRFQ

SO Dept: 0506

SO Doc ID: MIS2300000003

Published Date: 6/9/23

Close Date: 6/29/23

Close Time: 13:30

Status: Closed

Solicitation Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM

Total of Header Attachments: 6

Total of All Attachments: 6



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

**State of West Virginia
 Solicitation Response**

Proc Folder: 1228506
Solicitation Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM
Proc Type: Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2023-06-29 13:30	SR 0506 ESR06292300000006712	1

VENDOR
 VS0000043397
 IntegRhythm Inc.

Solicitation Number: CRFQ 0506 MIS2300000003
Total Bid: 339342.9600000000209547579288 **Response Date:** 2023-06-29 **Response Time:** 12:56:11
Comments:

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

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

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	One Time Implementation	0.00000	EA	83995.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Please see the attached proposal document attached to response.

Extended Description:

One Time Implementation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Initial Year Term	5.00000	YR	56557.160000	282785.80

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: First year licensing for ServiceNow PSDS (Public Sector Digital Services)

Extended Description:

Initial Year Term

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Year One Optional Renewal	0.00000	YR	56557.160000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Year 2 renewal for ServiceNow PSDS. Pease see attached quote, may be yearly change in price.

Extended Description:

Year One Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Year Two Optional Renewal	0.00000	YR	56557.160000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Year 3 of ServiceNow PSDS. Pease see attached quote, may be yearly change in price.

Extended Description:

Year Two Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Year Three Optional Renewal	0.00000	YR	56557.160000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Year 4 of ServiceNow PSDS. Pease see attached quote, may be yearly change in price.

Extended Description:

Year Three Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Additional user licenses	1.00000	EA	56557.160000	56557.16

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Year 5 of ServiceNow PSDS. Pease see attached quote, may be yearly change in price.

Extended Description:

Additional user licenses

GOVERNMENT - PRICE QUOTATION



CARAHSOFT TECHNOLOGY CORP



11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
 PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
 WWW.CARAHSOFT.COM | SALES@CARAHSOFT.COM

TO: Will Tosney
 INRY
 7760 France Ave S
 11th Floor
 Minneapolis, MN 55435

FOR: Crystal Hustead
 Buyer
 Department of Administration - Purchasing
 Division
 350 Capitol St.
 RM 519
 Charleston, WV 25301

FROM: Billy Quinn
 Carahsoft Technology Corp.
 11493 Sunset Hills Road
 Suite 100
 Reston, Virginia 20190

EMAIL: will.tosney@inry.com
PHONE:

EMAIL: crystal.g.hustead@wv.gov
PHONE: (304) 558-2402

EMAIL: Billy.Quinn@carahsoft.com
PHONE: (571) 662-4323
FAX:

TERMS: FTIN: 52-2189693
 Shipping Point: FOB Destination
 Remit To: Same as Above
 Payment Terms: Net 30 (On Approved Credit)
 Cage Code: 1P3C5
 DUNS No: 088365767
 UEI: DT8KJHZXVJH5
 Credit Cards: VISA/MasterCard/AMEX
 Credit Card Fees May Apply
 Sales Tax May Apply

QUOTE NO: 39332388
QUOTE DATE: 06/06/2023
QUOTE EXPIRES: 01/24/2024
RFQ NO: CRFQ 0506 MIS2300000003
SHIPPING: GROUND
TOTAL PRICE: \$56,557.16

TOTAL QUOTE: \$56,557.16

11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
 PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
 WWW.CARASOFT.COM | SALES@CARASOFT.COM

LINE NO.	PART NO.	DESCRIPTION	RATE PER MONTH	NO.MONTHS	QTY	EXTENDED PRICE
TOTAL PRICE:						\$56,557.16
TOTAL QUOTE:						\$56,557.16

11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190
 PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH
 WWW.CARASOFT.COM | SALES@CARASOFT.COM

LINE NO.	PART NO.	DESCRIPTION	RATE PER MONTH	NO.MONTHS	QTY	EXTENDED PRICE
1.		The Reseller identified in this Quote is solely authorized to resell the ServiceNow subscription products and services directly to the End Customer identified in this Quote. The Reseller shall not provide quotes or otherwise resell to any entities other than the End Customer. Reseller is expressly prohibited from reselling to any other reseller or permitting any customer to further distributor or resell and ServiceNow products or services.				
2.		The end customer's access and use of the Subscription Offerings are pursuant to the Public Sector Subscription Terms of Service, the Customer Support Addendum, Data Security Addendum, Data Processing Addendum, Product and Use Definitions, Product Overview, and the applicable Service Description for the purchased packaged services, ALL OF WHICH ARE EXPRESSLY DEEMED INCORPORATED HEREIN BY THIS REFERENCE (if not attached herein, then as set forth on https://www.servicenow.com/upgrade-schedules.html) (collectively, the "ServiceNow Subscription Service Terms"). All undefined capitalized terms herein shall have the meanings ascribed to such terms in the ServiceNow Subscription Service Terms. If any provision of this Order conflicts with the other documents comprising the Agreement, then this Order shall control.				
3.		Reseller accepts ServiceNow flow down terms SSA and agrees to reference all applicable ServiceNow flow down terms on all quotations to end user. Reseller is responsible for end user acceptance of applicable ServiceNow flow down terms.				
4.		Carahsoft and ServiceNow reserve the right to suspend access to the instance if payment is not made within payment terms.				
5.		Upon ServiceNow's request, Reseller will sponsor a claim on ServiceNow's behalf to enforce the ServiceNow Subscription Service Terms against End Customer in accordance with the contract disputes process applicable to End Customer, and Reseller, as a prime contractor.				
6.		Upon Carahsoft's request, Reseller shall provide Carahsoft credible evidence demonstrating End Customer's obligation to adhere to the ServiceNow Subscription Terms, such as a copy of the Reseller's prime contract with End Customer. Prior to providing the prime contract with End Customer to ServiceNow, Reseller, and Carahsoft, respectively shall redact any and all pricing or proprietary and confidential information.				
7.		Learning Credits expire 12 months after the purchase date and are Learning Credits used are billed monthly in arrears. In the event that Learning credits are used for onsite training, Travel and Expenses will be charged per onsite training class where the trainer comes onsite. (Not to Exceed \$2000 per onsite class).				
8.		Terms for Education Services offerings are set forth on https://www.servicenow.com/upgrade-schedules.html				
9.		If Reseller issues a purchase order, any additional or conflicting terms appearing in a purchase order shall not amend the Order Form or the Agreement.				
10.		For both Renewal Orders and the Option Year Orders, the following conditions shall apply:				
		i. the Renewal Products in the then expiring order continue to be made commercially available by ServiceNow at the time of the Renewal Order or Option Year Orders, and if not, then the Renewal Order or Option Year Orders shall be for ServiceNow's then available subscription product that is substantially equivalent to the Renewal Product in the expiring order (as determined by ServiceNow);				
		ii. the pricing model for the expiring order continues to be made available by ServiceNow at the time of the Renewal Order or Option Year Orders;				
		iii. the units of each Renewal Product in the Renewal Order or Option Year Orders are equal to or greater than the sum of all the units for that Renewal Product in all the Renewal Orders and Option Year Orders purchased by the customer during the subscription term of the then expiring order form;				
		iv. each Renewal Order and Option Year Orders are for non-refundable, non-cancellable twelve (12) month subscription terms; and				
		v. Customer must place the Renewal Order or Option Year Orders before the expiration of the subscription term of the then expiring order. For clarity, the foregoing does not apply to, without limitation, new products that are offered for sale after the date of this Order, products not ordered on this Order or professional services, training or events.				
11.		Please include the following information on the purchase order to Carahsoft. If this information is not included, the order will not be accepted.				
		A. End User contact information. End User is the End Customer contact responsible for the ServiceNow system and communications regarding the system.				
		B. Carahsoft quotation number for this purchase order.				
		C. Statement of Work or Change Order (if applicable).				
12.		Send purchase orders to CSTechOM@carahsoft.com .				
13.		Please refer to the attached pages for any Additional Terms and Entitlements for this sale.				
PRICES ARE FINAL. THIS ORDER IS NON-CANCELLABLE AND, EXCEPT AS OTHERWISE PROVIDED IN THE AGREEMENT, NON-REFUNDABLE. The order is for the entire subscription term and is undividable. Payments are due as per the invoice schedule.						

ServiceNow® Order Form - Product and Use Definitions

USER TYPE DEFINITIONS

"**User**" means any employee or contractor of Customer or Customer Affiliate that is assigned a unique username and password and has a user profile in the Subscription Service designated as "active". Only Users may be given access to the subscription service by Customer. A use right may not be shared or transferred. Customer shall not use the subscription service in a manner that circumvents usage restrictions.

"**Approver User**" is any User performing any of the functions set forth in the table below for an Approver User. An Approver User may only perform the functions set forth in the table below for an Approver User.

"**Requester User**" is any User that performs only the functions set forth in the table below for a Requester User.

"**End User**" has the same use rights as "**Requester User**."

"**Fulfiller User**" is any User other than an Approver User or Requester User. Without limitation, a Fulfiller User is any User that performs any function other than an Approver User function or Requester User function, including those set forth in the table below for a Fulfiller User.

"**Process User**" has the same use rights as "**Fulfiller User**."

FUNCTION / USE RIGHTS AUTHORIZED	USER TYPES		
	REQUESTER	APPROVER	FULLFILLER
Create its own request	included	included	included
View its own request	included	included	included
Modify its own request	included	included	included
Search the Service Catalog	included	included	included
Search the Knowledge Base	included	included	included
Access public pages	included	included	included
Take surveys	included	included	included
Set its own notification preferences	included	included	included
View assets assigned to user	included	included	included
Access and post to Live Feed	included	included	included
Initiate Chat sessions	included	included	included
Participate in a Watch List	included	included	included
View a report published to them	included	included	included
Approve requests by email that are routed to user	-	included	included
Approve requests routed to user via system	-	included	included
Create any record	-	-	included
Delete any record	-	-	included
Modify any record	-	-	included
Drill through any report	-	-	included
Create any report	-	-	included
Delete any report	-	-	included
Modify any report	-	-	included
Perform development activities	-	-	included (see below)
Perform administrative activities	-	-	included

CUSTOM TABLE CREATION AND INSTALLATION

The creation or installation of Custom Tables in a production instance requires either the purchase of the Now Platform App Engine product or an express Custom Table entitlement that is granted with the purchase of another product. A "Custom Table" is any non-ServiceNow provided table created or installed by or on behalf of Customer on the ServiceNow Platform and used for any purpose, including the creation of a custom application, unless such table is specifically exempt. A list of exempt ServiceNow provided tables and Custom Table use rights are as set forth in the Custom Table Guide on <https://www.servicenow.com/upgrade-schedules.html> and ARE EXPRESSLY DEEMED INCORPORATED HEREIN BY THIS REFERENCE. Customer may request printed copies of the documents incorporated herein by reference by emailing us at legal.request@servicenow.com.

SUBSCRIPTION PRODUCTS

Subscription Product Code/Name

Included ServiceNow Applications and Use Rights

<p>PROD19290 ServiceNow® Public Sector Digital Services Professional</p>	<p>Included Applications: Public Sector Digital Services Core; Customer Service Management; Engagement Messenger; Continual Improvement Management; DevOps Config; Proactive Customer Service Operations; Incident Management; Problem Management; Change Management; Release Management; Asset Management; Request Management; Cost Management; Walk-Up Experience; Outsourced Customer Service; Digital Portfolio Management; Vendor Manager Workspace; DevOps Change Velocity; Mobile Publishing; Universal Request Pro; Predictive Intelligence; Virtual Agent; and Performance Analytics</p> <p>Usage is limited by the number of purchased Fulfiller Users. Requester Users and External Users are not included in the Fulfiller User count and are not subject to Public Sector Digital Services Professional Subscription Product fees.</p> <p>Notwithstanding the definition of User above, an External User is defined as Customer's external contacts, including, but not limited to Customer's accounts, consumers, households, partners or other contacts. External User may create, view, modify, or approve requests of their own or related accounts via the customer portal, approve requests for new contact creation; and manage users or assets of their own or related accounts.</p> <p>Customer is wholly responsible for External Users' compliance with the terms of the Agreement and this ordering document, and all acts and omissions of such External Users.</p> <p>Each Fulfiller User purchased includes 2,000 Customer Portal Visits per month (unused Portal Visits expire monthly). Additional Customer Portal Visits may be purchased in increments of 1,000. A Visit is a period of activity on the Customer Portal, including a community visit. A new Visit is generated if an anonymous, unauthenticated, or External Requester User accesses, logs out, times out, or a Visit lasts beyond midnight in the Data Center Region indicated above.</p> <p>Virtual Agent includes 1000 Virtual Agent Conversation Transactions per Fulfiller User per month (unused Virtual Agent Conversation Transactions expire monthly). A Virtual Agent Conversation Transaction is defined as any structured conversation between a chatbot and user on a pre-built or custom topic. Additional monthly Virtual Agent Transactions require the purchase of Virtual Agent Transaction Pack(s).</p> <p>Customer is granted the right to create or install up to 50 Custom Tables and to grant each Fulfiller User, External User and Requester User the right to access those Custom Tables and perform the actions granted to that User Type.</p> <p>Extensions to the case table are exempt from the custom table count.</p> <p>Performance Analytics, Virtual Agent, Predictive Intelligence, and Universal Request Pro use rights apply only to Public Sector Digital Services Applications and 50 Custom Tables.</p> <p>Protocols and spokes that are available in the Subscription Product are set forth in the then-current applicable Product Documentation. Use of protocols and spokes may consume Integration Hub transactions that may require purchase of Integration Hub or Automation Engine subscription at an additional fee. Customer may use the spoke(s) included in Subscription Product for use cases even beyond the Subscription Product. Integration Hub Transactions are not included in the Subscription Product.</p> <p>The following Application(s) became available in the family release indicated: San Diego - Digital Portfolio Management and DevOps Change Velocity (Formerly: DevOps and DevOps Insights); Public Sector Digital Services Core Tokyo - DevOps Config</p>
<p>PROD19392 ServiceNow® Integration Hub Starter</p>	<p>Integration Hub Starter includes entitlement for up to 100,000 Integration Hub Transactions annually (unused Transactions expire annually without credit or refund). Integration Hub Starter includes Protocols and Spokes as set forth in the Integration Hub Overview on www.servicenow.com/upgrade-schedules.html, which IS EXPRESSLY DEEMED INCORPORATED HEREIN BY THIS REFERENCE. Customer may request printed copies of the documents incorporated herein by reference by emailing us at legal.request@servicenow.com.</p> <p>An Integration Hub Transaction is defined as any outbound call originating from Integration Hub, FlowDesigner, Remote Tables and/or Orchestration. This includes any operation, action, orchestration from Integration Hub, Remote Tables or Orchestration resulting in an outbound call.</p> <p>Additional annual Transactions require the purchase of a separate Integration Hub package.</p>
<p>PROD15338 ServiceNow® AI Search Starter</p>	<p>AI Search Starter includes entitlement of up to a total cumulative count of 500,000 indexed External Documents ("Total Limit"). Unused indexed External Documents expire at the Subscription Term End Date without credit or refund. If Customer exceeds their Total Limit, additional indexed External Documents can be procured for an additional fee.</p> <p>An External Document is a referenced object from an external source identified by a unique Document ID.</p>
<p>PROD18383 ServiceNow® Document Intelligence Starter - 5K</p>	<p>Included Application(s): Document Intelligence</p>

<p>Document Intelligence Pages</p>	<p>Document Intelligence Starter - 5K Document Intelligence Pages includes entitlement for up to 5,000 Document Intelligence Pages annually (unused Pages expire annually without credit or refund).</p> <p>A Document Intelligence Page is defined as a section of a document that ends with a page break. Documents with more than one page are counted as multiple pages, rounded to the next integer.</p> <p>Additional annual Pages require the purchase of a separate Document Intelligence Page bundle.</p> <p>Customer acknowledges that, to the extent it activates and uses Document Intelligence, Customer Data will be transferred outside of Customer's ServiceNow instance to a centralized ServiceNow environment, provided that such centralized ServiceNow environment shall be hosted in the same ServiceNow data center region as Customer's originating ServiceNow instance. Customer further acknowledges that the relevant terms set forth in the Agreement pertaining to ServiceNow's security and data protection program shall apply, except for those generally relating to certifications, attestations, or audits, and penetration testing. Any Customer Data transferred to such centralized ServiceNow environment will be deleted in accordance with ServiceNow's internal policies and procedures.</p>
<p>PROD20067 ServiceNow® Impact Guided - Public Sector (US)</p>	<p>Impact Guided – Public Sector (US) is subject to the Impact Guided – Public Sector (US) Package Description. If not attached to the ordering document, the Impact Guided – Public Sector (US) Package Description is as set forth on https://www.servicenow.com/upgrade-schedules.html and is INCORPORATED HEREIN BY THIS REFERENCE.</p>

Anupama Bulusu
Integrhythm Inc.
7760 France Ave S
11th Floor
Bloomington, MN 55435

Dear Anupama Bulusu:

Thank you for submitting an application to become certified in the Central Certification Program (CERT) sponsored by Hennepin County, Ramsey County, and the City of Saint Paul. This is to notify you that the review is now complete and the results are as follows:

Your company meets the requirements for **Small, Minority, and Women Business Enterprise (S/M/WBE)**. Your company will be coded in our database and directory accordingly with the following product/service description and North American Industry Classification System (NAICS) Codes:

Professional and Technical Services

NAICS Codes:

NAICS 541990: ALL OTHER PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

Your certification with the CERT Program is valid for three years. Your company's certification expiration date is **January 10, 2026**. You will be asked to update key company information periodically, but at least once every three years. **Meanwhile, it is your responsibility to notify this office in writing of any changes to directory information such as your company's address, telephone number, or products/services. In addition, you are required to notify this office in writing of any and all changes which could affect your company's eligibility to participate in the CERT Program within 30 days of such change.**

Questions regarding your certification may be directed to the CERT Program Coordinator at 651-266-8900.

Sincerely,

Serena Boyce
CERT Certification Specialist



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

Proc Folder: 1228506		Reason for Modification:	
Doc Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM		ADDENDUM 1 TO EXTEND BID OPENING AND PROVIDE ANSWERS TO VENDOR QUESTIONS	
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2023-06-09	2023-06-29 13:30	CRFQ 0506 MIS2300000003	2

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code:

Vendor Name : IntegRhythm Inc. (dba INRY)

Address : 8370

Street : Seneca Pointe

City : Eden Prairie

State : MN **Country :** USA **Zip :** 55347

Principal Contact : Will Tosney

Vendor Contact Phone: (612) 998-1461 **Extension:**

FOR INFORMATION CONTACT THE BUYER

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

Vendor
 Signature X

FEIN# 27-4536336

DATE 6/28/2023

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

ADDITIONAL INFORMATION

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR A 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 INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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	One Time Implementation	0.00000	EA		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
One Time Implementation

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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	Initial Year Term	5.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Initial Year Term

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
3	Year One Optional Renewal	0.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year One Optional Renewal

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
4	Year Two Optional Renewal	0.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year Two Optional Renewal

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
5	Year Three Optional Renewal	0.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year Three Optional Renewal

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
6	Additional user licenses	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Additional user licenses

SCHEDULE OF EVENTS

Line	Event	Event Date
1	VENDOR QUESTION DEADLINE	2023-06-01

SOLICITATION NUMBER: CRFQ MIS2300000003
Addendum Number: 1

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 extend bid opening to June 29, 2023 at 1:30 PM ET
 2. To provide answers to vendor questions
- No other changes

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 MIS2300000003

Addendum 1

Foster Care Case Management Software Questions

1. 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: In year one, the State anticipates 11 to 15 frontline users (Foster Care Ombudsman staff) of the cloud-based case management system. This core group of users will need access to the system to create, update, and query cases. Some of these users (up to 5) are anticipated to also need access to administrative functions of the software. An unlimited number of customers or complainants will have access to a web form or portal to enter complaints but will have no access to the case management system. Please note, the number of licensees is a preliminary estimate based on existing case loads, because this is a new unit, new duties and authorities may be assigned by the Department or the State Legislature at any time and those changes could cause growth in case loads and staffing. We would prefer a licensing structure that gives us flexibility to add licenses as our Office and our Mission grows without locking in an excessive number of licenses up front.

2. Your RFP mentions a need for certain third-party data-exchange interfaces. Please provide an inventory of these required system interfaces and the purpose of each. Also, please note if each interface will be one-way or two-way.

Answer: The RFQ references integration with back-office systems including versions of Microsoft Office Suite and/or Google Docs (Specification 3.1.1.9) as well as document storage in common formats including Portable Document Format (PDF), Microsoft Office Suite, Google Docs, etc. (Specification 3.1.1.13) but does not specify any third party data exchange or interface.

3. Can the State list all the types of licenses, registrations, permits, etc. that the agency supports, the approximate number of entities applying for and holding each type, and specify which license type(s) will require which types of online functionality (e.g. online applications, renewals, verifications, disciplinary processes, etc.)?

Answer: The Foster Care Ombudsman does not issue, revoke, monitor, maintain or support licenses, registrations or permits and the solution sought by the RFQ does not require this capability.

4. Please provide the names of all system outputs required, including reports, queries, and correspondences. Also provide the audience and the location from which each will be run (back-office, public website, specific login-secured area of public website, etc.). If such details are not available at this time, please provide at least the total numbers of each type of output required.

Answer: Refer to Specification 3.1.1.24 System must provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and level of detail required. System must provide for historical reports to show trends and comparisons between time periods. System must provide for generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions. System must provide a library of standard reports supporting common aspects of case management and investigatory practice. System must provide an ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved

for future reports. 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.

5. What is the budget for this project? If all cost proposals come in above a certain amount, would this RFQ be canceled? 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: The State does not disclose budget during the bid process.

6. Sometimes we see that an agency desires to meet an overall schedule but struggles with finding the time to deliver regularly scheduled items which add up to the total schedule. Given any limited resources on the part of the State, will 10-day turnarounds on vendor approval requests be met, and where not met, what opportunities for recourse might be available to coordinate between teams to ensure the appropriate attention to the project to ensure a timely delivery?

Answer: Referring to item (6), the State recognizes that assignments, activities, and approvals required of the State to the Vendor would not be in the Vendor's control. Thus, the Vendor and Agency (State) would agree on a best-efforts schedule for performance of Contract Services with certain milestones established to promote accountability. The State will work with the Vendor to ensure that appropriate attention is provided to the project to ensure both quality workmanship and timely delivery, and provide for exceptions or extensions as warranted. The 10-day turnaround is for emergency orders only as stated in Section 6.1 Delivery and Return of the RFQ

7. Regarding vendor's onsite presence: (a) Please elaborate on the State's requirements or preferences for onsite presence at specific times/durations during implementation and support. (b) In the case that the costs of onsite presence greatly increase the price of services, please help vendors understand the State's preferences of onsite presence versus cost savings. (c) Would the State prefer to have vendors show onsite services as optional in the cost proposal, on a per-week, or other basis, to allow cost-savings if less onsite time is required?

Answer: This RFQ does not specify any requirement that the vendor be on-site. If the vendor feels that a certain piece of work requires an on-site presence they should include the associated costs in their bid.

8. TRAVEL: Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.

8. Regarding vendor's staff assigned to the project, our experience shows vendors with their own SaaS solution tend to have more processes guiding the implementation, as opposed to custom software requiring more dedicated staff management and adjustment to guide the implementation. Based on this: (a) Please confirm which roles are required to be assigned to the project. (b) Please indicate any required/expected percentage of such employees' full-time work be dedicated to the project. (c) In the

case that the costs of such employees' time being dedicated to the project would greatly increase the price of services, please help vendors understand the State's preferences of 100% dedicated staff time versus cost savings by partial staff allocation to the project. (d) Would the State prefer to have vendors show such dedicated staff time as optional in the cost proposal, to allow cost-savings if less dedicated staff management is required?

Answer: Unless we require the vendor to define their project team, project plan, and approach in their response, (and we did not) these are determinations the vendor needs to make based on their experience implementing the proposed solution. Our requirement is that the vendor provides qualified staff who can meet the requirements of the RFQ and the time and cost constraints of their bid.

9. What is the timeframe for the potential release and award of a CRFQ, and what is the desired implementation timeframe?

Answer: The award is subject to various reviews and internal approvals but a specific timeframe cannot be provided. With regard to implementation timelines, the Vendor shall deliver standard orders within 180 (One Hundred Eighty) working days after orders are received.

10. Do you know how many users the State will need per year for this case management system? Are there any more details you can share around implementation? Will it include data conversion?

Answer: Within the first year, we estimate 11 - 15 users that will access the system with additional users as the unit grows. With regard to implementation timelines, the Vendor shall deliver standard orders within 180 (One Hundred Eighty) working days after orders are received. The Foster Care Ombudsman currently stores casework data within a Google Sheet that may be convertible, and casework documents within Google Docs and Google Workspace that may be convertible.

11. Could you provide the estimated number of users that will need to access the system.

Answer: Within the first year, we estimate 11 - 15 users that will access the system with additional users as the unit grows. The Foster Care Ombudsman unit may grow in size and complexity at the will of the WV Legislature.

12. On average, how many interactions per complaint does the West Virginia Office of the Foster Care Ombudsman have with the involved parties of a case?

Answer: The number of interactions per complaint varies widely given the scope, nature, and complexity of the complaint. At the lower level of complaint intensity, three to 10 interactions would be typical. At a higher level of complaint intensity, 10 to 25 interactions would be typical, but it could be more. At the highest level of complaint intensity (full, systemic investigations), the number of interactions would likely exceed 50 and be difficult to quantify further at this time.

13. Has the budget for this project been allocated/approved?

Answer: The State does not disclose budget during the bid process.

14. Has the State seen any demos/talked to vendors prior to releasing the RFP, if so which vendors and technologies?

Answer: The Foster Care Ombudsman has conducted extensive market research related to case management, customer relationship management, workflow management, and citizen services technologies.

15. What is the desired go-live date for this system?

Answer: Although we do not have a firm date or deadline, calendar year 2024 is date certain and prior to the July 1, 2024 start to the state fiscal year is preferred.

16. Is there an incumbent system/vendor? If so provide detail around incumbent.

Answer: No, the Foster Care Ombudsman currently houses data in a Google Sheet and houses casework information (notes, documents obtained, etc.) in labeled Google Workspace folders and subfolders/files. We do not presently use an integrated case management system solution.

17. Can the State provide a short 1-2 week extension to the due date for proposals, to allow for more thoughtful and complete responses to the RFP?

Answer: We would be agreeable to an extension.

18. Can offshore resources be used for development of the solution, if production and non-production environments that contain PII/PHI and other confidential information remain in the US and are not accessed by offshore resources?

Answer: Cloud solutions offered must be in compliance with the Minimum Acceptable Risk Standards for Exchanges (MARS-E), Version 2.2. MARS-E standards permit the use of offshore resources as long as the offshore resources are properly isolated from the data and systems that contain confidential and sensitive information.

19. Line 4 of the RFQ states, "1 additional license" would be needed, but does not have mention of an initial quantity of users required, for the Office of the Foster Care Ombudsman, or other West Virginia agencies. Can West Virginia confirm how many internal West Virginia employee users would need login access to the system upon contract award?

Answer: For the first year, we estimate 11 - 15 users that will access the system with additional users added as the unit grows. The wording "1 additional license" is for each user we add after the initial implementation, if there would be a cost.

20. How many complaints would the Office of the Foster Care Ombudsman estimate would be received on a yearly basis?

Answer: On a full year basis, the current statistics reflect between 750 and 1000 inbound complaints to the Foster Care Ombudsman. Given the trends in data and the expanding reach of the Foster Care Ombudsman unit, the count could substantially increase over the next several years but we are unable to reliably project at this time.

21. Requirement 3.1.2 states "Vendor must actively provide a Statewide case management, customer relationship management, or investigations management system to a minimum of three state agencies". Is West Virginia referring to West Virginia state agency references only, or would any state-level agency reference throughout the 50 U.S. states satisfy this requirement?

Answer: Any state-level agency throughout the 50 United States including United States Territories would satisfy this requirement.

22. Is the intent of this RFQ Award to establish a Cloud-Based Case Management System contract specific only to the Office of the Foster Care Ombudsman, or is it West Virginia's intent to establish a Cloud-Based Case Management System contract which can be leveraged by any WV state agency in the future?

Answer: The intent of this RFQ is to establish a Cloud-Based Case Management System for the Foster Care Ombudsman unit, sufficiently scalable however the WV Legislature directs its jurisdiction. For example, during the 2023 Regular Session of Legislature, the Foster Care Ombudsman jurisdiction was expanded beyond the foster youth and foster/kinship parent populations to include all youth in juvenile justice and all youth who sustain a critical incident or die in West Virginia. As the Ombudsman function is recognized as a valuable public service, its potential to serve other target populations is possible but cannot be forecasted with certainty.

23. Will the State accept enterprise-level Federal and County-wide CRM, case management, and/or investigations management systems to fulfill this past performance requirement?

Answer: The State will accept a system that meets the required specifications and would effectively serve the operating and reporting requirements of the Foster Care Ombudsman.

24. Number of End Users requiring licenses to work in the system

Answer: For the first year, we estimate 11 - 15 users that will access the system with additional users added as the unit grows.

25. How many customers will visit your site monthly

Answer: On a full year basis, the current statistics reflect between 750 and 1000 inbound complaints to the Foster Care Ombudsman. This reflects approximately 60 - 85 new inbound complaints per month. Given the trends in data and the expanding reach of the Foster Care Ombudsman unit, the count could substantially increase over the next several years but we are unable to reliably project at this time.

26. How many customers will log into your system monthly.

Answer: On a full year basis, the current statistics reflect between 750 and 1000 inbound complaints to the Foster Care Ombudsman. This reflects approximately 60 - 85 new inbound complaints per month. Given the trends in data and the expanding reach of the Foster Care Ombudsman unit, the count could substantially increase over the next several years but we are unable to reliably quantify at this time. To clarify, customers or complainants may enter complaints to a web form or a portal, but would not be actively logging in to the case management system. Access to this system would be reserved for Foster Care Ombudsman management and staff, and other authorized technical/vendor users.

27. How many Cases do you estimate you will receive per month

Answer: On a full year basis, the current statistics reflect between 750 and 1000 inbound complaints to the Foster Care Ombudsman. This reflects approximately 60 - 85 new inbound complaints per month. Given the trends in data and the expanding reach of the Foster Care Ombudsman unit, the count could substantially increase over the next several years but we are unable to reliably project at this time.

28. How many contacts are part of your system (include any and all contacts such as children, parents, siblings...)

Answer: On a full year basis, the current statistics reflect between 750 and 1000 inbound complaints to the Foster Care Ombudsman. Since our inception in late 2019, the unit is in receipt of approximately 2000 inbound complaints. Each inbound complaint comes from one individual, and the number of witnesses/collaterals contacted by the Foster Care Ombudsman to research and resolve the complaint is variable. On average, the Foster Care Ombudsman contacts between three and 15 witnesses/collaterals in the course of resolving a complaint.

29. Do you currently use Salesforce? If yes will this functionality be added to the existing Salesforce

Answer: We do not have an incumbent system other than applications within the Google Workspace. Accordingly, we are not currently a Salesforce customer.

30. Are there to be any integrations with the new solution

Answer: There are no integrations specified in the RFQ.

31. Will data need to be migrated to the new system? If yes how many and what type of records.

Answer: The Foster Care Ombudsman currently stores casework data within a Google Sheet that may be convertible, and casework documents within Google Docs that may be convertible. We currently house data and documents in a Google Workspace environment. We do not use an incumbent case management system.

32. Will files need to be migrated into the new system? If so, what is the total size of all files? How many individual files to be migrated?

Answer: The Foster Care Ombudsman currently stores casework data within a Google Sheet that may be convertible, and casework documents within Google Docs that may be convertible. We currently house data and documents in a Google Workspace environment. The Google Sheet file size is currently 5,023 KB in .csv format. We do not use an incumbent case management system.

33. Please clarify “scanning” in requirement 3.1.1.9. Does this mean the system or integrated app will scan a paper doc and have the ability to attach the newly scanned electronic doc to a record in the new system?

Answer: The intent of this specification as it relates to scanning, is that documents that are scanned, can be uploaded into the cloud-based case management system and inserted to a case record for storage and future reference. The Foster Care Ombudsman is not anticipating nor expecting that the system itself performs scanning of documents.

3.1.1.9 System must provide access to all applications and user documentation, vendor use, and help tool within a single site. System must integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs. System must allow document attachments to be scanned and associated with one or more person/case records, as well as complaints, notes, and other identifiers. System must allow documents to be thumbnail/first page previewed prior to full access.

34. Do you currently use Microsoft Suite and/or Google Docs?

Answer: The Executive Branch of the State of West Virginia, of which the Foster Care Ombudsman is a part, primarily uses applications within the Google Workspace. However, we maintain certain access to the Microsoft Suite and we receive information created by others in many applications including Microsoft.

35. What is your current system you use to track Cases that this solution would replace?

Answer: The Foster Care Ombudsman currently stores casework data within a Google Sheet that may be convertible, and casework documents within Google Docs that may be convertible. We currently house data and documents in a Google Workspace environment. We do not use an incumbent case management system.

36. Do you currently have an address validation application?

Answer: No.

37. Are you currently using any reporting tools? And would you like to continue using those same tools?

Answer: The Foster Care Ombudsman currently produces and houses data and documents, including reports, in a Google Workspace environment. We do not yet have/use an incumbent case management system. The Executive Branch of the State of West Virginia, of which the Foster Care Ombudsman is a part, primarily uses applications within the Google Workspace, but anticipates and expects robust reporting and data presentation features contained within a cloud-based case management system.

38. Would the State extend the deadline for proposal submission by two weeks?

Answer: We would be agreeable to an extension.

39. Do you have an anticipated budget for this project? If so, will you share the budget amount?

Answer: The State does not disclose budget during the bid process.

40. Please provide the number of internal users (state employees) who will need access to the system.

Answer: For the first year, we estimate 11 - 15 users that will access the system with additional users added as the unit grows.

41. Please provide the number of external users (health care providers or others) who will need access to the system.

Answer: To clarify, customers, complainants or other external users may enter complaints to a web form or a portal, but would not be actively logging in to the case management system. Access to this system would be reserved for Foster Care Ombudsman management and staff, and other authorized technical/vendor users.

42. How many cases do you anticipate being managed in the new system?

Answer: On a full year basis, the current statistics reflect between 750 and 1000 inbound complaints to the Foster Care Ombudsman. This reflects approximately 60 - 85 new inbound complaints per month. Given the trends in data and the expanding reach of the Foster Care Ombudsman unit, the count could substantially increase over the next several years but we are unable to reliably project at this time.

43. Is the state currently using another system and/or vendor to manage grants? If so, what is the system/vendor? If not, how many grants are currently being managed by the state?

Answer: The Foster Care Ombudsman is not managing grants and does not anticipate doing so.

44. Will this project require data migration from existing systems? If so, please describe the data, the number and type of records, the total size of files, etc.

Answer: The Foster Care Ombudsman currently stores casework data within a Google Sheet that may be convertible, and casework documents within Google Docs that may be convertible. We currently house data and documents in a Google Workspace environment. The Google Sheet file size is currently 5,023 KB in .csv format. We do not use an incumbent case management system.

45. Will the system need to integrate with any existing systems such as payment systems?

Answer: Integration with existing systems is not anticipated at this time.

46. Do the systems you wish this solution to interface with have APIs available? If so, are they available for review? If not, please describe integration capabilities.

Answer: This solution will not require API integration.

47. Are there any Security needs required to maintain the data? i.e., FEDRAMP and audit requirements? If so, please describe.

Answer: Cloud Solutions proposed must comply with the Minimum Acceptable Risk Standards for Exchanges (MARS-E), Version 2.2.

48. Does the agency hold licenses for an electronic signature tool you would like to use as part of this solution? If so, please provide the name. If not, do you have a preferred tool or would you like this to be included in the proposal?

Answer: No, we do not hold licenses for an electronic signature tool and do not need this included in the proposal.

49. Please elaborate on the agency's preference for future systems maintenance. Does the agency prefer future support and maintenance is done by the selected partner, internal team or a combination of both?

Answer: The Foster Care Ombudsman prefers that support and maintenance of the cloud-based case management system be provided by the selected vendor partner for the terms of the awarded contract.

50. Is the vendor required to be on site for any portion of the contract term?

Answer: The State does not anticipate significant onsite Vendor presence for this project and did not specify on-site presence in the RFQ. Any agreed onsite presence would be to satisfy a project need or requirement that could not be sufficiently met using other forms of information exchange and communication. The Vendor is responsible for all mileage and travel costs associated with the performance of this contract. If onsite presence is anticipated by a Vendor, such cost be included in the bid.

51. Have you seen demonstrations of any case management systems prior to issuing this Solicitation? If so, will you share which system?

Answer: The Foster Care Ombudsman has conducted extensive market research related to case management, customer relationship management, workflow management, and citizen services technologies.

52. On page 17 of 50, regarding insurance, there are a couple boxes checked without an explanation beside them. Can you verify that no critical information for vendors was excluded from this section?

Answer: The one box that was checked but blank should contain the following information:

***CERTIFICATE HOLDER SHOULD READ AS FOLLOWS: State of West Virginia One Davis Square, Suite 200, 321 Capital St Charleston, WV 25301

The second box was checked in error.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MIS2300000003

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.

IntegRhythm Inc. (dba INRY)

Company



Authorized Signature

6/28/2023

Date

NOTE: This addendum acknowledgment 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**

Proc Folder: 1228506		Reason for Modification:	
Doc Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2023-05-24	2023-06-15 13:30	CRFQ 0506 MIS2300000003	1

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

VENDOR		
Vendor Customer Code:		
Vendor Name : IntegRhythm Inc. (dba INRY)		
Address : 8370		
Street : Seneca Pointe		
City : Eden Prairie		
State : MN	Country : USA	Zip : 55347
Principal Contact :		
Vendor Contact Phone:	Extension:	

FOR INFORMATION CONTACT THE BUYER					
Crystal G Husted (304) 558-2402 crystal.g.husted@wv.gov					
<table border="0" style="width: 100%;"> <tr> <td>Vendor Signature X</td> <td style="text-align: center;">FEIN#</td> <td style="text-align: right;">DATE</td> </tr> </table>			Vendor Signature X	FEIN#	DATE
Vendor Signature X	FEIN#	DATE			

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

ADDITIONAL INFORMATION

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF INSPECTOR GENERAL, IS SOLICITING BIDS TO ESTABLISH A CONTRACT FOR A 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
INSPECTOR GENERAL'S
OFFICE STATE CAPITOL
COMPLEX
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	One Time Implementation	0.00000	EA		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
One Time Implementation

INVOICE TO**SHIP TO**

HEALTH AND HUMAN
RESOURCES
INSPECTOR GENERAL'S
OFFICE STATE CAPITOL
COMPLEX
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	Initial Year Term	5.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Initial Year Term

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
3	Year One Optional Renewal	0.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year One Optional Renewal

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
4	Year Two Optional Renewal	0.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year Two Optional Renewal

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
5	Year Three Optional Renewal	0.00000	YR		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Year Three Optional Renewal

INVOICE TO		SHIP TO	
HEALTH AND HUMAN RESOURCES INSPECTOR GENERAL'S OFFICE STATE CAPITOL COMPLEX 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
6	Additional user licenses	1.00000	EA		

Comm Code	Manufacturer	Specification	Model #
43232200			

Extended Description:
Additional user licenses

SCHEDULE OF EVENTS

Line	Event	Event Date
1	VENDOR QUESTION DEADLINE	2023-06-01

INSTRUCTIONS TO VENDORS SUBMITTING BIDS

1. REVIEW DOCUMENTS THOROUGHLY: The attached documents contain a solicitation for bids. Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked could lead to disqualification of a Vendor's bid. All bids must be submitted in accordance with the provisions contained in these instructions and the Solicitation. Failure to do so may result in disqualification of Vendor's bid.

2. MANDATORY TERMS: The Solicitation may contain mandatory provisions identified by the use of the words "must," "will," and "shall." Failure to comply with a mandatory term in the Solicitation will result in bid disqualification.

3. PREBID MEETING: The item identified below shall apply to this Solicitation.

A pre-bid meeting will not be held prior to bid opening

A **MANDATORY PRE-BID** meeting will be held at the following place and time:

All Vendors submitting a bid must attend the mandatory pre-bid meeting. Failure to attend the mandatory pre-bid meeting shall result in disqualification of the Vendor's bid. No one individual is permitted to represent more than one vendor at the pre-bid meeting. Any individual that does attempt to represent two or more vendors will be required to select one vendor to which the individual's attendance will be attributed. The vendors not selected will be deemed to have not attended the pre-bid meeting unless another individual attended on their behalf.

An attendance sheet provided at the pre-bid meeting shall serve as the official document verifying attendance. Any person attending the pre-bid meeting on behalf of a Vendor must list on the attendance sheet his or her name and the name of the Vendor he or she is representing.

Additionally, the person attending the pre-bid meeting should include the Vendor's E-Mail address, phone number, and Fax number on the attendance sheet. It is the Vendor's responsibility to locate the attendance sheet and provide the required information. Failure to complete the attendance sheet as required may result in disqualification of Vendor's bid.

All Vendors should arrive prior to the starting time for the pre-bid. Vendors who arrive after the starting time but prior to the end of the pre-bid will be permitted to sign in but are charged with knowing all matters discussed at the pre-bid.

Questions submitted at least five business days prior to a scheduled pre-bid will be discussed at the pre-bid meeting if possible. Any discussions or answers to questions at the pre-bid meeting are preliminary in nature and are non-binding. Official and binding answers to questions will be published in a written addendum to the Solicitation prior to bid opening.

4. VENDOR QUESTION DEADLINE: Vendors may submit questions relating to this Solicitation to the Purchasing Division. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the address listed below to be considered. A written response will be published in a Solicitation addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this Solicitation are preliminary in nature and are nonbinding.

Submitted emails should have the solicitation number in the subject line.

Question Submission Deadline: June 1, 2023 at 10:00 AM ET

Submit Questions to: Crystal Hustead
2019 Washington Street, East
Charleston, WV 25305
Fax: (304) 558-3970
Email: Crystal.G.Hustead@wv.gov

5. VERBAL COMMUNICATION: Any verbal communication between the Vendor and any State personnel is not binding, including verbal communication at the mandatory pre-bid conference. Only information issued in writing and added to the Solicitation by an official written addendum by the Purchasing Division is binding.

6. BID SUBMISSION: All bids must be submitted on or before the date and time of the bid opening listed in section 7 below. Vendors can submit bids electronically through *wv*OASIS, in paper form delivered to the Purchasing Division at the address listed below either in person or by courier, or in facsimile form by faxing to the Purchasing Division at the number listed below. Notwithstanding the foregoing, the Purchasing Division may prohibit the submission of bids electronically through *wv*OASIS at its sole discretion. Such a prohibition will be contained and communicated in the *wv*OASIS system resulting in the Vendor's inability to submit bids through *wv*OASIS. The Purchasing Division will not accept bids, modification of bids, or addendum acknowledgment forms via email. Bids submitted in paper or facsimile form must contain a signature. Bids submitted in *wv*OASIS are deemed to be electronically signed.

Any bid received by the Purchasing Division staff is considered to be in the possession of the Purchasing Division and will not be returned for any reason.

For Request for Proposal ("RFP") Responses Only: Submission of a response to a Request for Proposal is not permitted in *wv*OASIS. In the event that Vendor is responding to a request for proposal, the Vendor shall submit one original technical and one original cost proposal prior to the bid opening date and time identified in Section 7 below, plus n/a convenience copies of each to the Purchasing Division at the address shown below. Additionally, the Vendor should clearly identify and segregate the cost proposal from the technical proposal in a separately sealed envelope.

Bid Delivery Address and Fax Number:

Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130
Fax: 304-558-3970

A bid submitted in paper or facsimile form should contain the information listed below on the face of the submission envelope or fax cover sheet. Otherwise, the bid may be rejected by the Purchasing Division.

VENDOR NAME:

BUYER: Crystal Hustead
SOLICITATION NO.: CRFQ MIS2300000003
BID OPENING DATE: June 15, 2023
BID OPENING TIME: 1:30 PM ET
FAX NUMBER: 304-558-3970

7. BID OPENING: Bids submitted in response to this Solicitation will be opened at the location identified below on the date and time listed below. Delivery of a bid after the bid opening date and time will result in bid disqualification. For purposes of this Solicitation, a bid is considered delivered when confirmation of delivery is provided by wvOASIS (in the case of electronic submission) or when the bid is time stamped by the official Purchasing Division time clock (in the case of hand delivery).

Bid Opening Date and Time: June 15, 2023 at 1:30 PM ET

Bid Opening Location: Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

8. ADDENDUM ACKNOWLEDGEMENT: Changes or revisions to this Solicitation will be made by an official written addendum issued by the Purchasing Division. Vendor should acknowledge receipt of all addenda issued with this Solicitation by completing an Addendum Acknowledgment Form, 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.

9. BID FORMATTING: Vendor should type or electronically enter the information onto its bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.

10. ALTERNATE MODEL OR BRAND: Unless the box below is checked, any model, brand, or specification listed in this Solicitation establishes the acceptable level of quality only and is not intended to reflect a preference for, or in any way favor, a particular brand or vendor. Vendors may bid alternates to a listed model or brand provided that the alternate is at least equal to the model or brand and complies with the required specifications. The equality of any alternate being bid shall be determined by the State at its sole discretion. Any Vendor bidding an alternate model or brand should clearly identify the alternate items in its bid and should include manufacturer's specifications, industry literature, and/or any other relevant documentation demonstrating the equality of the alternate items. Failure to provide information for alternate items may be grounds for rejection of a Vendor's bid.

This Solicitation is based upon a standardized commodity established under W. Va. Code § 5A-3-61. Vendors are expected to bid the standardized commodity identified. Failure to bid the standardized commodity will result in your firm's bid being rejected.

11. EXCEPTIONS AND CLARIFICATIONS: The Solicitation contains the specifications that shall form the basis of a contractual agreement. Vendor shall clearly mark any exceptions, clarifications, or other proposed modifications in its bid. Exceptions to, clarifications of, or modifications of a requirement or term and condition of the Solicitation may result in bid disqualification.

12. COMMUNICATION LIMITATIONS: In accordance with West Virginia Code of State Rules §148-1-6.6, communication with the State of West Virginia or any of its employees regarding this Solicitation during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited without prior Purchasing Division approval. Purchasing Division approval for such communication is implied for all agency delegated and exempt purchases.

13. REGISTRATION: Prior to Contract award, the apparent successful Vendor must be properly registered with the West Virginia Purchasing Division and must have paid the \$125 fee, if applicable.

14. UNIT PRICE: Unit prices shall prevail in cases of a discrepancy in the Vendor's bid.

15. PREFERENCE: Vendor Preference may be requested in purchases of motor vehicles or construction and maintenance equipment and machinery used in highway and other infrastructure projects. Any request for preference must be submitted in writing with the bid, must specifically identify the preference requested with reference to the applicable subsection of West Virginia Code § 5A-3-37, and must include with the bid any information necessary to evaluate and confirm the applicability of the requested preference. A request form to help facilitate the request can be found at: www.state.wv.us/admin/purchase/vrc/Venpref.pdf.

15A. RECIPROCAL PREFERENCE: The State of West Virginia applies a reciprocal preference to all solicitations for commodities and printing in accordance with W. Va. Code § 5A-3-37(b). In effect, non-resident vendors receiving a preference in their home states, will see that same preference granted to West Virginia resident vendors bidding against them in West Virginia. Any request for reciprocal preference must include with the bid any information necessary to evaluate and confirm the applicability of the preference. A request form to help facilitate the request can be found at: www.state.wv.us/admin/purchase/vrc/Venpref.pdf.

16. SMALL, WOMEN-OWNED, OR MINORITY-OWNED BUSINESSES: For any solicitations publicly advertised for bid, in accordance with West Virginia Code §5A-3-37 and W. Va. CSR § 148-22-9, any non-resident vendor certified as a small, women-owned, or minority-owned business under W. Va. CSR § 148-22-9 shall be provided the same preference made available to any resident vendor. Any non-resident small, women-owned, or minority-owned business must identify itself as such in writing, must submit that writing to the Purchasing Division with its bid, and must be properly certified under W. Va. CSR § 148-22-9 prior to contract award to receive the preferences made available to resident vendors. Preference for a non-resident small, women-owned, or minority owned business shall be applied in accordance with W. Va. CSR § 148-22-9.

17. WAIVER OF MINOR IRREGULARITIES: The Director reserves the right to waive minor irregularities in bids or specifications in accordance with West Virginia Code of State Rules § 148-1-4.6.

18. ELECTRONIC FILE ACCESS RESTRICTIONS: Vendor must ensure that its submission in wvOASIS can be accessed and viewed by the Purchasing Division staff immediately upon bid opening. The Purchasing Division will consider any file that cannot be immediately accessed and viewed at the time of the bid opening (such as, encrypted files, password protected files, or incompatible files) to be blank or incomplete as context requires and are therefore unacceptable. A vendor will not be permitted to unencrypt files, remove password protections, or resubmit documents after bid opening to make a file viewable if those documents are required with the bid. A Vendor may be required to provide document passwords or remove access restrictions to allow the Purchasing Division to print or electronically save documents provided that those documents are viewable by the Purchasing Division prior to obtaining the password or removing the access restriction.

19. NON-RESPONSIBLE: The Purchasing Division Director reserves the right to reject the bid of any vendor as Non-Responsible in accordance with W. Va. Code of State Rules § 148-1-5.3, when the Director determines that the vendor submitting the bid does not have the capability to fully perform or lacks the integrity and reliability to assure good-faith performance.”

20. ACCEPTANCE/REJECTION: The State may accept or reject any bid in whole, or in part in accordance with W. Va. Code of State Rules § 148-1-4.5. and § 148-1-6.4.b.”

21. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

22. WITH THE BID REQUIREMENTS: In instances where these specifications require documentation or other information with the bid, and a vendor fails to provide it with the bid, the Director of the Purchasing Division reserves the right to request those items after bid opening and prior to contract award pursuant to the authority to waive minor irregularities in bids or specifications under W. Va. CSR § 148-1-4.6. This authority does not apply to instances where state law mandates receipt with the bid.

23. EMAIL NOTIFICATION OF AWARD: The Purchasing Division will attempt to provide bidders with e-mail notification of contract award when a solicitation that the bidder participated in has been awarded. For notification purposes, bidders must provide the Purchasing Division with a valid email address in the bid response. Bidders may also monitor wvOASIS or the Purchasing Division's website to determine when a contract has been awarded.

24. ISRAEL BOYCOTT CERTIFICATION: Vendor's act of submitting a bid in response to this solicitation shall be deemed a certification from bidder to the State that bidder is not currently engaged in, and will not for the duration of the contract, engage in a boycott of Israel. This certification is required by W. Va. Code § 5A-3-63.

GENERAL TERMS AND CONDITIONS:

1. CONTRACTUAL AGREEMENT: Issuance of an Award Document signed by the Purchasing Division Director, or his designee, and approved as to form by the Attorney General's office constitutes acceptance by the State of this Contract made by and between the State of West Virginia and the Vendor. Vendor's signature on its bid, or on the Contract if the Contract is not the result of a bid solicitation, signifies Vendor's agreement to be bound by and accept the terms and conditions contained in this Contract.

2. DEFINITIONS: As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications included with this Solicitation/Contract.

2.1. "Agency" or "Agencies" means the agency, board, commission, or other entity of the State of West Virginia that is identified on the first page of the Solicitation or any other public entity seeking to procure goods or services under this Contract.

2.2. "Bid" or "Proposal" means the vendors submitted response to this solicitation.

2.3. "Contract" means the binding agreement that is entered into between the State and the Vendor to provide the goods or services requested in the Solicitation.

2.4. "Director" means the Director of the West Virginia Department of Administration, Purchasing Division.

2.5. "Purchasing Division" means the West Virginia Department of Administration, Purchasing Division.

2.6. "Award Document" means the document signed by the Agency and the Purchasing Division, and approved as to form by the Attorney General, that identifies the Vendor as the contract holder.

2.7. "Solicitation" means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

2.8. "State" means the State of West Virginia and/or any of its agencies, commissions, boards, etc. as context requires.

2.9. "Vendor" or "Vendors" means any entity submitting a bid in response to the Solicitation, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

3. CONTRACT TERM; RENEWAL; EXTENSION: The term of this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below:

Term Contract

Initial Contract Term: The Initial Contract Term will be for a period of five (5) years. The Initial Contract Term becomes effective on the effective start date listed on the first page of this Contract, identified as the State of West Virginia contract cover page containing the signatures of the Purchasing Division, Attorney General, and Encumbrance clerk (or another page identified as _____), and the Initial Contract Term ends on the effective end date also shown on the first page of this Contract.

Renewal Term: This Contract may be renewed upon the mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any request for renewal should be delivered to the Agency and then submitted to the Purchasing Division thirty (30) days prior to the expiration date of the initial contract term or appropriate renewal term. A Contract renewal shall be in accordance with the terms and conditions of the original contract. Unless otherwise specified below, renewal of this Contract is limited to three (3) successive one (1) year periods or multiple renewal periods of less than one year, provided that the multiple renewal periods do not exceed the total number of months available in all renewal years combined. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's office (Attorney General approval is as to form only)

Alternate Renewal Term – This contract may be renewed for _____ successive _____ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's office (Attorney General approval is as to form only)

Delivery Order Limitations: In the event that this contract permits delivery orders, a delivery order may only be issued during the time this Contract is in effect. Any delivery order issued within one year of the expiration of this Contract shall be effective for one year from the date the delivery order is issued. No delivery order may be extended beyond one year after this Contract has expired.

Fixed Period Contract: This Contract becomes effective upon Vendor's receipt of the notice to proceed and must be completed within _____ days.

Fixed Period Contract with Renewals: This Contract becomes effective upon Vendor's receipt of the notice to proceed and part of the Contract more fully described in the attached specifications must be completed within _____ days. Upon completion of the work covered by the preceding sentence, the vendor agrees that:

the contract will continue for _____ years;

the contract may be renewed for _____ successive _____ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor, Agency, Purchasing Division and Attorney General's Office (Attorney General approval is as to form only).

One-Time Purchase: The term of this Contract shall run from the issuance of the Award Document until all of the goods contracted for have been delivered, but in no event will this Contract extend for more than one fiscal year.

Construction/Project Oversight: This Contract becomes effective on the effective start date listed on the first page of this Contract, identified as the State of West Virginia contract cover page containing the signatures of the Purchasing Division, Attorney General, and Encumbrance clerk (or another page identified as _____), and continues until the project for which the vendor is providing oversight is complete.

Other: Contract Term specified in _____

4. AUTHORITY TO PROCEED: Vendor is authorized to begin performance of this contract on the date of encumbrance listed on the front page of the Award Document unless either the box for "Fixed Period Contract" or "Fixed Period Contract with Renewals" has been checked in Section 3 above. If either "Fixed Period Contract" or "Fixed Period Contract with Renewals" has been checked, Vendor must not begin work until it receives a separate notice to proceed from the State. The notice to proceed will then be incorporated into the Contract via change order to memorialize the official date that work commenced.

5. QUANTITIES: The quantities required under this Contract shall be determined in accordance with the category that has been identified as applicable to this Contract below.

Open End Contract: Quantities listed in this Solicitation/Award Document are approximations only, based on estimates supplied by the Agency. It is understood and agreed that the Contract shall cover the quantities actually ordered for delivery during the term of the Contract, whether more or less than the quantities shown.

Service: The scope of the service to be provided will be more clearly defined in the specifications included herewith.

Combined Service and Goods: The scope of the service and deliverable goods to be provided will be more clearly defined in the specifications included herewith.

One-Time Purchase: This Contract is for the purchase of a set quantity of goods that are identified in the specifications included herewith. Once those items have been delivered, no additional goods may be procured under this Contract without an appropriate change order approved by the Vendor, Agency, Purchasing Division, and Attorney General's office.

Construction: This Contract is for construction activity more fully defined in the specifications.

6. EMERGENCY PURCHASES: The Purchasing Division Director may authorize the Agency to purchase goods or services in the open market that Vendor would otherwise provide under this Contract if those goods or services are for immediate or expedited delivery in an emergency. Emergencies shall include, but are not limited to, delays in transportation or an unanticipated increase in the volume of work. An emergency purchase in the open market, approved by the Purchasing Division Director, shall not constitute a breach of this Contract and shall not entitle the Vendor to any form of compensation or damages. This provision does not excuse the State from fulfilling its obligations under a One-Time Purchase contract.

7. REQUIRED DOCUMENTS: All of the items checked in this section must be provided to the Purchasing Division by the Vendor as specified:

LICENSE(S) / CERTIFICATIONS / PERMITS: In addition to anything required under the Section of the General Terms and Conditions entitled Licensing, the apparent successful Vendor shall furnish proof of the following licenses, certifications, and/or permits upon request and in a form acceptable to the State. The request may be prior to or after contract award at the State's sole discretion.

The apparent successful Vendor shall also furnish proof of any additional licenses or certifications contained in the specifications regardless of whether or not that requirement is listed above.

8. INSURANCE: The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, Vendor shall provide the Agency with proof that the insurance mandated herein has been continued. Vendor must also provide Agency with immediate notice of any changes in its insurance policies, including but not limited to, policy cancelation, policy reduction, or change in insurers. The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether that insurance requirement is listed in this section.

Vendor must maintain:

Commercial General Liability Insurance in at least an amount of: \$1,000,000.00 per occurrence.

Automobile Liability Insurance in at least an amount of: _____ per occurrence.

Professional/Malpractice/Errors and Omission Insurance in at least an amount of: _____ per occurrence. Notwithstanding the forgoing, Vendor's are not required to list the State as an additional insured for this type of policy.

Commercial Crime and Third Party Fidelity Insurance in an amount of: _____ per occurrence.

Cyber Liability Insurance in an amount of: _____ per occurrence.

Builders Risk Insurance in an amount equal to 100% of the amount of the Contract.

Pollution Insurance in an amount of: _____ per occurrence.

Aircraft Liability in an amount of: _____ per occurrence.

9. WORKERS' COMPENSATION INSURANCE: Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

10. VENUE: All legal actions for damages brought by Vendor against the State shall be brought in the West Virginia Claims Commission. Other causes of action must be brought in the West Virginia court authorized by statute to exercise jurisdiction over it.

11. LIQUIDATED DAMAGES: This clause shall in no way be considered exclusive and shall not limit the State or Agency's right to pursue any other available remedy. Vendor shall pay liquidated damages in the amount specified below or as described in the specifications:

N/A _____ for _____.

Liquidated Damages Contained in the Specifications.

Liquidated Damages Are Not Included in this Contract.

12. ACCEPTANCE: Vendor's signature on its bid, or on the certification and signature page, constitutes an offer to the State that cannot be unilaterally withdrawn, signifies that the product or service proposed by vendor meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions contained in the Solicitation unless otherwise indicated.

13. PRICING: The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this Solicitation/Contract by the State. A Vendor's inclusion of price adjustment provisions in its bid, without an express authorization from the State in the Solicitation to do so, may result in bid disqualification. Notwithstanding the foregoing, Vendor must extend any publicly advertised sale price to the State and invoice at the lower of the contract price or the publicly advertised sale price.

14. PAYMENT IN ARREARS: Payments for goods/services will be made in arrears only upon receipt of a proper invoice, detailing the goods/services provided or receipt of the goods/services, whichever is later. Notwithstanding the foregoing, payments for software maintenance, licenses, or subscriptions may be paid annually in advance.

15. PAYMENT METHODS: Vendor must accept payment by electronic funds transfer and P-Card. (The State of West Virginia's Purchasing Card program, administered under contract by a banking institution, processes payment for goods and services through state designated credit cards.)

16. TAXES: The Vendor shall pay any applicable sales, use, personal property or any other taxes arising out of this Contract and the transactions contemplated thereby. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.

17. ADDITIONAL FEES: Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly provided for in the solicitation published by the State of West Virginia, included in the Contract, or included in the unit price or lump sum bid amount that Vendor is required by the solicitation to provide. Including such fees or charges as notes to the solicitation may result in rejection of vendor's bid. Requesting such fees or charges be paid after the contract has been awarded may result in cancellation of the contract.

18. FUNDING: This Contract shall continue for the term stated herein, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise made available, this Contract becomes void and of no effect beginning on July 1 of the fiscal year for which funding has not been appropriated or otherwise made available. If that occurs, the State may notify the Vendor that an alternative source of funding has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

19. CANCELLATION: The Purchasing Division Director reserves the right to cancel this Contract immediately upon written notice to the vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The Purchasing Division Director may also cancel any purchase or Contract upon 30 days written notice to the Vendor in accordance with West Virginia Code of State Rules § 148-1-5.2.b.

20. TIME: Time is of the essence regarding all matters of time and performance in this Contract.

21. APPLICABLE LAW: This Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, West Virginia Code, or West Virginia Code of State Rules is void and of no effect.

22. COMPLIANCE WITH LAWS: Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

23. ARBITRATION: Any references made to arbitration contained in this Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to this Contract are hereby deleted, void, and of no effect.

24. MODIFICATIONS: This writing is the parties' final expression of intent. Notwithstanding anything contained in this Contract to the contrary no modification of this Contract shall be binding without mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only). Any change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Purchasing Division and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.

25. WAIVER: The failure of either party to insist upon a strict performance of any of the terms or provision of this Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

26. SUBSEQUENT FORMS: The terms and conditions contained in this Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by Vendor to the Agency or Purchasing Division such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of Vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

27. ASSIGNMENT: Neither this Contract nor any monies due, or to become due hereunder, may be assigned by the Vendor without the express written consent of the Agency, the Purchasing Division, the Attorney General's office (as to form only), and any other government agency or office that may be required to approve such assignments.

28. WARRANTY: The Vendor expressly warrants that the goods and/or services covered by this Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the Agency; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

29. STATE EMPLOYEES: State employees are not permitted to utilize this Contract for personal use and the Vendor is prohibited from permitting or facilitating the same.

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

31. YOUR SUBMISSION IS A PUBLIC DOCUMENT: Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., 5-22-1 et seq., and 5G-1-1 et seq. and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any bid, proposal, or other document to the Purchasing Division constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

32. LICENSING: In accordance with West Virginia Code of State Rules § 148-1-6.1.e, Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agency or political subdivision. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Upon request, the Vendor must provide all necessary releases to obtain information to enable the Purchasing Division Director or the Agency to verify that the Vendor is licensed and in good standing with the above entities.

SUBCONTRACTOR COMPLIANCE: Vendor shall notify all subcontractors providing commodities or services related to this Contract that as subcontractors, they too are required to be licensed, in good standing, and up-to-date on all state and local obligations as described in this section. Obligations related to political subdivisions may include, but are not limited to, business licensing, business and occupation taxes, inspection compliance, permitting, etc. Notification under this provision must occur prior to the performance of any work under the contract by the subcontractor.

33. ANTITRUST: In submitting a bid to, signing a contract with, or accepting a Award Document from any agency of the State of West Virginia, the Vendor agrees to convey, sell, assign, or transfer to the State of West Virginia all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to Vendor.

34. VENDOR NON-CONFLICT: Neither Vendor nor its representatives are permitted to have any interest, nor shall they acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the Agency.

Revised 11/1/2022

35. VENDOR RELATIONSHIP: The relationship of the Vendor to the State shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by this Contract. The Vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this Solicitation and resulting contract. Neither the Vendor, nor any employees or subcontractors of the Vendor, shall be deemed to be employees of the State for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing.

Vendor shall hold harmless the State, and shall provide the State and Agency with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

36. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws.

37. NO DEBT CERTIFICATION: In accordance with West Virginia Code §§ 5A-3-10a and 5-22-1(i), the State is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State. By submitting a bid, or entering into a contract with the State, Vendor is affirming 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, neither the Vendor nor any related party owe a debt as defined above, and neither the Vendor nor any related party are in employer default as defined in the statute cited above unless the debt or employer default is permitted under the statute.

38. CONFLICT OF INTEREST: Vendor, its officers or members or employees, shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the Agency.

39. REPORTS: Vendor shall provide the Agency and/or the Purchasing Division with the following reports identified by a checked box below:

Such reports as the Agency and/or the Purchasing Division may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by agency, etc.

Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by agency. Quarterly reports should be delivered to the Purchasing Division via email at purchasing.division@wv.gov.

40. BACKGROUND CHECK: In accordance with W. Va. Code § 15-2D-3, the State reserves the right to prohibit a service provider's employees from accessing sensitive or critical information or to be present at the Capitol complex based upon results addressed from a criminal background check. Service providers should contact the West Virginia Division of Protective Services by phone at (304) 558-9911 for more information.

41. PREFERENCE FOR USE OF DOMESTIC STEEL PRODUCTS: Except when authorized by the Director of the Purchasing Division pursuant to W. Va. Code § 5A-3-56, no contractor may use or supply steel products for a State Contract Project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W. Va. Code § 5A-3-56. As used in this section:

- a. "State Contract Project" means any erection or construction of, or any addition to, alteration of or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of and materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after June 6, 2001.
- b. "Steel Products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated or otherwise similarly processed, or processed by a combination of two or more or such operations, from steel made by the open heath, basic oxygen, electric furnace, Bessemer or other steel making process.
- c. The Purchasing Division Director may, in writing, authorize the use of foreign steel products if:
 1. The cost for each contract item used does not exceed one tenth of one percent (.1%) of the total contract cost or two thousand five hundred dollars (\$2,500.00), whichever is greater. For the purposes of this section, the cost is the value of the steel product as delivered to the project; or
 2. The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

42. PREFERENCE FOR USE OF DOMESTIC ALUMINUM, GLASS, AND STEEL: In Accordance with W. Va. Code § 5-19-1 et seq., and W. Va. CSR § 148-10-1 et seq., for every contract or subcontract, subject to the limitations contained herein, for the construction, reconstruction, alteration, repair, improvement or maintenance of public works or for the purchase of any item of machinery or equipment to be used at sites of public works, only domestic aluminum, glass or steel products shall be supplied unless the spending officer determines, in writing, after the receipt of offers or bids, (1) that the cost of domestic aluminum, glass or steel products is unreasonable or inconsistent with the public interest of the State of West Virginia, (2) that domestic aluminum, glass or steel products are not produced in sufficient quantities to meet the contract requirements, or (3) the available domestic aluminum, glass, or steel do not meet the contract specifications. This provision only applies to public works contracts awarded in an amount more than fifty thousand dollars (\$50,000) or public works contracts that require more than ten thousand pounds of steel products.

The cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than twenty percent (20%) of the bid or offered price for foreign made aluminum, glass, or steel products. If the domestic aluminum, glass or steel products to be supplied or produced in a “substantial labor surplus area”, as defined by the United States Department of Labor, the cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than thirty percent (30%) of the bid or offered price for foreign made aluminum, glass, or steel products. This preference shall be applied to an item of machinery or equipment, as indicated above, when the item is a single unit of equipment or machinery manufactured primarily of aluminum, glass or steel, is part of a public works contract and has the sole purpose or of being a permanent part of a single public works project. This provision does not apply to equipment or machinery purchased by a spending unit for use by that spending unit and not as part of a single public works project.

All bids and offers including domestic aluminum, glass or steel products that exceed bid or offer prices including foreign aluminum, glass or steel products after application of the preferences provided in this provision may be reduced to a price equal to or lower than the lowest bid or offer price for foreign aluminum, glass or steel products plus the applicable preference. If the reduced bid or offer prices are made in writing and supersede the prior bid or offer prices, all bids or offers, including the reduced bid or offer prices, will be reevaluated in accordance with this rule.

43. INTERESTED PARTY SUPPLEMENTAL DISCLOSURE: W. Va. Code § 6D-1-2 requires that for contracts with an actual or estimated value of at least \$1 million, the Vendor must submit to the Agency a disclosure of interested parties prior to beginning work under this Contract. Additionally, the Vendor must submit a supplemental disclosure of interested parties reflecting any new or differing interested parties to the contract, which were not included in the original pre-work interested party disclosure, within 30 days following the completion or termination of the contract. A copy of that form is included with this solicitation or can be obtained from the WV Ethics Commission. This requirement does not apply to publicly traded companies listed on a national or international stock exchange. A more detailed definition of interested parties can be obtained from the form referenced above.

44. PROHIBITION AGAINST USED OR REFURBISHED: Unless expressly permitted in the solicitation published by the State, Vendor must provide new, unused commodities, and is prohibited from supplying used or refurbished commodities, in fulfilling its responsibilities under this Contract.

45. VOID CONTRACT CLAUSES: This Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.

46. ISRAEL BOYCOTT: Bidder understands and agrees that, pursuant to W. Va. Code § 5A-3-63, it is prohibited from engaging in a boycott of Israel during the term of this contract.

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.

(Printed Name and Title) Will Tosney, Sr. Account Executive

(Address) 8370 Seneca Pointe, Eden Prairie, MN 55347

(Phone Number) / (Fax Number) (612) 998-1461

(Email address) will.tosney@inry.com

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract 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/Contract 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 this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; 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; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

IntegRhythm Inc. (dba INRY)

(Company) _____

(Signature of Authorized Representative) _____

William Tosney, Sr. Account Executive, 6/28/2023

(Printed Name and Title of Authorized Representative) (Date) _____

(612) 998-1461

(Phone Number) (Fax Number) _____

will.tosney@inry.com

(Email Address) _____

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ MIS2300000003

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:

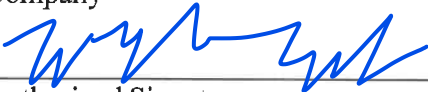
(Check the box next to each addendum received)

- | | |
|--|--|
| <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.

IntegRhythm Inc. (dba INRY)

Company



Authorized Signature

6/28/2023

Date

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

**REQUEST FOR QUOTATION
CRFQ MIS230000003
CLOUD-BASED STATEWIDE CASE MANAGEMENT SYSTEM**

SPECIFICATIONS

- 1. PURPOSE AND SCOPE:** The West Virginia Purchasing Division is soliciting bids on behalf of West Virginia Department of Health and Human Resources, Office of Inspector General to establish an open-end contract for an enterprise level, Cloud-based, statewide case management system.

The West Virginia Department of Health and Human Resources (DHHR) has established within its Office of Inspector General (OIG) an office of the Foster Care Ombudsman (FCO). Mandated by state statute W.V. Code §9-5-27, this newly established child welfare-directed service is responsible for advocating for the rights of foster children and foster parents; participating in any procedure to investigate and resolve complaints filed on behalf of a foster child or foster parent; monitoring the development and implementation of federal, state, and local legislation, regulation and policies with respect to foster care services; and establishing and maintaining a statewide uniform report system to collect and analyze data relating to complaints for the purpose of identifying and resolving significant problems facing foster-children and foster-parents as a class. The FCO is responsible for generating and distributing periodic reports prepared to standard and ad hoc specifications to serve the needs and interests of various stakeholder groups. As such, the purpose of this request for quotations is to obtain competitive bids for a Foster Care Case Management system. The FCO will receive, evaluate, refer, assign, monitor, investigate, and report on child-welfare related concerns, complaints, and otherwise identified systemic issues as determined by the FCO or assigned/recommended by its stakeholders inside and outside state government. In addition to providing hosting and technical support for the technology, the chosen vendor will provide services to include system design, installation, application/report configuration, user training, support services, and periodic upgrades/enhancements for the chosen solution.

NOTE: This request is covered in part or in whole by federal funds. All bidders will be required to acknowledge and adhere to Attachment 1 — Federal Funds Addendum

NOTE: The WVDHHR has developed an EEOP Utilization Report, and it is available at:

<http://www.wvdhhr.org/pdfs/H1.5%20Utilization%20Report%20and%20EEOP%20policy.p>

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2. DEFINITIONS: The terms listed below shall have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

2.1 “Contract Item” or “Contract Items” means the list of items identified in Section 3.1 below and on the Pricing Pages.

2.2 “Pricing Pages” means the schedule of prices, estimated order quantity, and totals contained in wvOASIS or attached hereto as Exhibit A, and used to evaluate the Solicitation responses.

2.3 “Solicitation” means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

3. GENERAL REQUIREMENTS:

3.1 Contract Items and Mandatory Requirements: Vendor shall provide Agency with the Contract Items listed below on an open-end and continuing basis. Contract Items must meet or exceed the mandatory requirements as shown below.

3.1.1 Enterprise level, Cloud-Based, statewide case management system which must be compatible with the West Virginia Office of Technology’s current operating system, Windows 11.

3.1.1.1 System must be modular to allow system upgrades and enhancements, must be scalable for increasing the number of licensed users and to support unlimited persons, cases, contacts, activity transactions, and reports.

3.1.1.2 System must have administrative ability to create enterprise-wide announcements to be displayed on the user home page, which can be targeted to all users, or specific group users, or specific users. System must enable real time collaboration or access sharing with system users.

3.1.1.3 System must allow for speech to text functionality where applicable, and be accessible from laptops, desktops, and tablets.

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CLOUD-BASED STATEWIDE CASE MANAGEMENT SYSTEM

- 3.1.1.4** System must provide the capability for authorized users to drill down to individual data elements in dashboard reports. System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task and case status monitoring by case, user, team, and/or enterprise.
- 3.1.1.5** System must provide a quick search capability based on a single and or an advanced multiple field/filters.
- 3.1.1.6** System must allow name fields must include capacity to enter and store nicknames, appellations, and suffixes.
- 3.1.1.7** System must maintain a chronological and reportable audit trail of activity by user and/or case, including a history of modifications to all data and event logs by record and/or user.
- 3.1.1.8** System must allow administrators to add, delete, change, or control user role-based security permissions by users or user group types.
- 3.1.1.9** System must provide access to all applications and user documentation, vendor use, and help tool within a single site. System must integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs. System must allow document attachments to be scanned and associated with one or more person/case records, as well as complaints, notes, and other identifiers. System must allow documents to be thumbnail/first page previewed prior to full access.
- 3.1.1.10** 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.
- 3.1.1.11** System must allow users to return to using a quick search feature to the three (3) most recently accessed records or activities. System must provide capabilities to determine whether a caller, a person, or case record already exists to

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CLOUD-BASED STATEWIDE CASE MANAGEMENT SYSTEM

avoid duplication. System must provide a means to merge identified duplicate records.

- 3.1.1.12** 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. System must allow addresses to be United States Postal Service (USPS) validated. System must also allow entry of foreign addresses and characters. System must allow for APO (Military) addresses if individuals are deployed or stationed overseas.
- 3.1.1.13** System must allow retention/display of photographic images, audio and video files in their native format within contact records as needed. System must support documentation storage within a case or record, in all common formats including Portable Document Format (PDF), Microsoft Suite, Google Docs, etc. and must be document level searchable.
- 3.1.1.14** 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 case or record. System must support full case management workflow enabling 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.
- 3.1.1.15** System must support automated or manual assignment of a unique case identifier upon creation of a new case. System must provide a way to navigate a case summary view. System must support correspondence production including letter and email templates, then can be connect to workflows, can be auto populated with case record or person specific data, and can be transmitted and timestamped.

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- 3.1.1.16** System must support the ability to generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list. System must support templates as form letters, fill-in form letters, customized form letters, or custom letters using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word. System must support capability to create output in hard copy, paper letters, emails, or Google Docs.
- 3.1.1.17** 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. System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users. System must provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.
- 3.1.1.18** 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.
- 3.1.1.19** System must include monitoring functionality allowing progress to be monitored and alerts/reminders generated when workflow nears completion or needs approval.
- 3.1.1.20** System must provide means for administrators to update the look and content of the public facing portal and the administrator created content on associated weblinks.
- 3.1.1.21** System must provide a public facing portal that enables modification of text size and other page appearance qualities to comply with the Americans with Disabilities Act (ADA) standards as well as industry standard login/password requirements. System must provide a customizable web form incorporating a CAPTCHA response test.

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- 3.1.1.22** System must enable administrative development of data field labels, characteristics, and picklists. System must also enable users to search picklists using drop down menus.
- 3.1.1.23** System must allow automation of business practices of the agency and allow administrators to create workflow within the application. System also allows for users to set a specific list of favorites, such as searches, templates, and contacts. System must also provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets.
- 3.1.1.24** System must provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and level of detail required. System must provide for historical reports to show trends and comparisons between time periods. System must provide for generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions. System must provide a library of standard reports supporting common aspects of case management and investigatory practice. System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future reports. 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.
- 3.1.1.25** System upgrades, enhancements, and error corrections must be at no additional cost/charge when such upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.
- 3.1.1.26** System must enable a public facing web form and a public use email to integrate and populate, as specified by

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the administrator, to contact, person, or case records to avoid duplication of data entry.

- 3.1.2** Vendor must actively provide a statewide case management, customer relationship management, or investigations management system to a minimum of three state agencies. Evidence of compliance with requirement shall be provided with bid. Vendor must provide contact information including contact name, phone number and email address of a director (or equivalent) of a program where they have successfully installed and supported an Enterprise level, Cloud-based statewide case management system. Evidence of compliance with requirement shall be provided with bid response.

4. CONTRACT AWARD:

- 4.1 Contract Award:** The Contract is intended to provide Agencies with a purchase price on all Contract Items. The Contract shall be awarded to the Vendor that provides the Contract Items meeting the required specifications for the lowest overall total cost as shown on the Pricing Pages.
- 4.2 Pricing Pages:** Vendor should complete the Pricing Pages by typing or electronically entering the information into the Pricing Page through wvOasis to prevent errors in the evaluation. Vendor should complete the Pricing Pages in their entirety as failure to do so may result in Vendor's bids being disqualified.

The Pricing Pages contain a list of the Contract Items and estimated purchase volume. The estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.

Vendor should electronically enter the information into the Pricing Pages through wvOASIS, if available, or as an electronic document

5. ORDERING AND PAYMENT:

- 5.1 Ordering:** Vendor shall accept orders through wvOASIS, regular mail, facsimile, e-mail, or any other written form of communication. Vendor may, but is not required to, accept on-line orders through a secure internet ordering portal/website. If Vendor has the ability to accept on-line orders, it should include in its response a brief

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description of how Agencies may utilize the on-line ordering system. Vendor shall ensure that its on-line ordering system is properly secured prior to processing Agency orders on-line.

5.2 Payment: Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.

6. DELIVERY AND RETURN:

6.1 Delivery Time: Vendor shall deliver standard orders within 180 (One Hundred Eighty) working days after orders are received. Vendor shall deliver emergency orders within 10 (Ten) working day(s) after orders are received. Vendor shall ship all orders in accordance with the above schedule and shall not hold orders until a minimum delivery quantity is met.

6.2 Late Delivery: The Agency placing the order under this Contract must be notified in writing if orders will be delayed for any reason. Any delay in delivery that could cause harm to an Agency will be grounds for cancellation of the delayed order, and/or obtaining the items ordered from a third party.

Any Agency seeking to obtain items from a third party under this provision must first obtain approval of the Purchasing Division.

6.3 Delivery Payment/Risk of Loss: Standard order delivery shall be F.O.B. destination to the Agency's location. Vendor shall include the cost of standard order delivery charges in its bid pricing/discount and is not permitted to charge the Agency separately for such delivery. The Agency will pay delivery charges on all emergency orders provided that Vendor invoices those delivery costs as a separate charge with the original freight bill attached to the invoice.

6.4 Return of Unacceptable Items: If the Agency deems the Contract Items to be unacceptable, the Contract Items shall be returned to Vendor at Vendor's expense and with no restocking charge. Vendor shall either make arrangements for the return within five (5) days of being notified that items are unacceptable, or permit the Agency to arrange for the return and reimburse Agency for delivery expenses. If the original packaging cannot be utilized for the return, Vendor will supply the Agency with appropriate return packaging upon request. All returns of unacceptable items shall be F.O.B. the Agency's location. The returned product shall either be replaced, or the Agency shall receive a full credit or refund for the purchase price, at the Agency's discretion.

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6.5 Return Due to Agency Error: Items ordered in error by the Agency will be returned for credit within 30 days of receipt, F.O.B. Vendor's location. Vendor shall not charge a restocking fee if returned products are in a resalable condition. Items shall be deemed to be in a resalable condition if they are unused and in the original packaging. Any restocking fee for items not in a resalable condition shall be the lower of the Vendor's customary restocking fee or 5% of the total invoiced value of the returned items.

7. VENDOR DEFAULT:

7.1 The following shall be considered a vendor default under this Contract.

7.1.1 Failure to provide Contract Items in accordance with the requirements contained herein.

7.1.2 Failure to comply with other specifications and requirements contained herein.

7.1.3 Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.

7.1.4 Failure to remedy deficient performance upon request.

7.2 The following remedies shall be available to Agency upon default.

7.2.1 Immediate cancellation of the Contract.

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

7.2.3 Any other remedies available in law or equity.

8. MISCELLANEOUS:

8.1 No Substitutions: Vendor shall supply only Contract Items submitted in response to the Solicitation unless a contract modification is approved in accordance with the provisions contained in this Contract.

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- 8.2 Vendor Supply:** Vendor must carry sufficient inventory of the Contract Items being offered to fulfill its obligations under this Contract. By signing its bid, Vendor certifies that it can supply the Contract Items contained in its bid response.
- 8.3 Reports:** Vendor shall provide quarterly reports and annual summaries to the Agency showing the Agency's items purchased, quantities of items purchased, and total dollar value of the items purchased. Vendor shall also provide reports, upon request, showing the items purchased during the term of this Contract, the quantity purchased for each of those items, and the total value of purchases for each of those items. Failure to supply such reports may be grounds for cancellation of this Contract
- 8.4 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: Will Tosney
Telephone Number: (612) 998-1461
Fax Number: _____
Email Address: will.tosney@inry.com

FEDERAL FUNDS ADDENDUM
2 C.F.R. §§ 200.317 – 200.327

Purpose: This addendum is intended to modify the solicitation in an attempt to make the contract compliant with the requirements of 2 C.F.R. §§ 200.317 through 200.327 relating to the expenditure of certain federal funds. This solicitation will allow the State to obtain one or more contracts that satisfy standard state procurement, state federal funds procurement, and county/local federal funds procurement requirements.

Instructions: Vendors who are willing to extend their contract to procurements with federal funds and the requirements that go along with doing so, should sign the attached document identified as: “REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS (2 C.F.R. § 200.317)”

Should the awarded vendor be unwilling to extend the contract to federal funds procurement, the State reserves the right to award additional contracts to vendors that can and are willing to meet federal funds procurement requirements.

Changes to Specifications: Vendors should consider this solicitation as containing two separate solicitations, one for state level procurement and one for county/local procurement.

State Level: In the first solicitation, bid responses will be evaluated with applicable preferences identified in sections 15, 15A, and 16 of the “Instructions to Vendors Submitting Bids” to establish a contract for both standard state procurements and state federal funds procurements.

County Level: In the second solicitation, bid responses will be evaluated with applicable preferences identified in Sections 15, 15A, and 16 of the “Instructions to Vendors Submitting Bids” omitted to establish a contract for County/Local federal funds procurement.

Award: If the two evaluations result in the same vendor being identified as the winning bidder, the two solicitations will be combined into a single contract award. If the evaluations result in a different bidder being identified as the winning bidder, multiple contracts may be awarded. The State reserves the right to award to multiple different entities should it be required to satisfy standard state procurement, state federal funds procurement, and county/local federal funds procurement requirements.

State Government Use Caution: State agencies planning to utilize this contract for procurements subject to the above identified federal regulations should first consult with the federal agency providing the applicable funding to ensure the contract is compliant.

County/Local Government Use Caution: County and Local government entities planning to utilize this contract for procurements subject to the above identified federal regulation should first consult with the federal agency providing the applicable funding to ensure the contract is compliant. For purposes of County/Local government use, the solicitation resulting in this contract was conducted in accordance with the procurement laws, rules, and procedures governing the West Virginia Department of Administration, Purchasing Division, except that vendor preference has been omitted for County/Local use purposes and the contract terms contained in the document entitled “REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS (2 C.F.R. § 200.317)” have been added.

FEDERAL FUNDS ADDENDUM

REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS (2 C.F.R. § 200.317):

The State of West Virginia Department of Administration, Purchasing Division, and the Vendor awarded this Contract intend that this Contract be compliant with the requirements of the Procurement Standards contained in the Uniform Administrative Requirements, Cost Principles, and Audit Requirements found in 2 C.F.R. § 200.317, et seq. for procurements conducted by a Non-Federal Entity. Accordingly, the Parties agree that the following provisions are included in the Contract.

**1. MINORITY BUSINESSES, WOMEN'S BUSINESS ENTERPRISES, AND LABOR SURPLUS AREA FIRMS:
(2 C.F.R. § 200.321)**

- a. The State confirms that it has taken all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. Those affirmative steps include:

- (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
- (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
- (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
- (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
- (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) above.

- b. Vendor confirms that if it utilizes subcontractors, it will take the same affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

**2. DOMESTIC PREFERENCES:
(2 C.F.R. § 200.322)**

- a. The State confirms that as appropriate and to the extent consistent with law, it has, to the greatest extent practicable under a Federal award, provided a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United

States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

b. Vendor confirms that will include the requirements of this Section 2. Domestic Preference in all subawards including all contracts and purchase orders for work or products under this award.

c. Definitions: For purposes of this section:

(1) "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

3. BREACH OF CONTRACT REMEDIES AND PENALTIES:

(2 C.F.R. § 200.327 and Appendix II)

(a) The provisions of West Virginia Code of State Rules § 148-1-5 provide for breach of contract remedies, and penalties. A copy of that rule is attached hereto as Exhibit A and expressly incorporated herein by reference.

4. TERMINATION FOR CAUSE AND CONVENIENCE:

(2 C.F.R. § 200.327 and Appendix II)

(a) The provisions of West Virginia Code of State Rules § 148-1-5 govern Contract termination. A copy of that rule is attached hereto as Exhibit A and expressly incorporated herein by reference.

5. EQUAL EMPLOYMENT OPPORTUNITY:

(2 C.F.R. § 200.327 and Appendix II)

Except as otherwise provided under 41 CFR Part 60, and if this contract meets the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3, this contract includes the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

6. DAVIS-BACON WAGE RATES:

(2 C.F.R. § 200.327 and Appendix II)

Vendor agrees that if this Contract includes construction, all construction work in excess of \$2,000 will be completed and paid for in compliance with the Davis–Bacon Act (40 U.S.C. 3141–3144, and 3146–3148) as supplemented by Department of Labor regulations (29 CFR Part 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must:

- (a) pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor.
- (b) pay wages not less than once a week.

A copy of the current prevailing wage determination issued by the Department of Labor is attached hereto as Exhibit B. The decision to award a contract or subcontract is conditioned upon the acceptance of the wage determination. The State will report all suspected or reported violations to the Federal awarding agency.

7. ANTI-KICKBACK ACT:
(2 C.F.R. § 200.327 and Appendix II)

Vendor agrees that it will comply with the Copeland Anti-KickBack Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). Accordingly, Vendor, Subcontractors, and anyone performing under this contract are prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The State must report all suspected or reported violations to the Federal awarding agency.

8. CONTRACT WORK HOURS AND SAFETY STANDARDS ACT
(2 C.F.R. § 200.327 and Appendix II)

Where applicable, and only for contracts awarded by the State in excess of \$100,000 that involve the employment of mechanics or laborers, Vendor agrees to comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, Vendor is required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

9. RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.
(2 C.F.R. § 200.327 and Appendix II)

If the Federal award meets the definition of “funding agreement” under 37 CFR § 401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

10. CLEAN AIR ACT
(2 C.F.R. § 200.327 and Appendix II)

Vendor agrees that if this contract exceeds \$150,000, Vendor is to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401–7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251–1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

11. DEBARMENT AND SUSPENSION
(2 C.F.R. § 200.327 and Appendix II)

The State will not award to any vendor that is listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

12. BYRD ANTI-LOBBYING AMENDMENT
(2 C.F.R. § 200.327 and Appendix II)

Vendors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

13. PROCUREMENT OF RECOVERED MATERIALS
(2 C.F.R. § 200.327 and Appendix II; 2 C.F.R. § 200.323)

Vendor agrees that it and the State must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the

Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

14. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.

(2 C.F.R. § 200.327 and Appendix II; 2 CFR § 200.216)

Vendor and State agree that both are prohibited from obligating or expending funds under this Contract to:

- (1) Procure or obtain;
- (2) Extend or renew a contract to procure or obtain; or
- (3) Enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. As described in Public Law 115–232, section 889, covered telecommunications equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).
 - (i) For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).
 - (ii) Telecommunications or video surveillance services provided by such entities or using such equipment.
 - (iii) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.

In implementing the prohibition under Public Law 115–232, section 889, subsection (f), paragraph (1), heads of executive agencies administering loan, grant, or subsidy programs shall prioritize available funding and technical support to assist affected businesses, institutions and organizations as is reasonably necessary for those affected entities to transition from covered communications equipment and services, to procure replacement equipment and services, and to ensure that communications service to users and customers is sustained.

State of West Virginia

Vendor Name: [IntegRhythm Inc. \(dba INRY\)](#)

By: _____

By: _____

Printed Name: _____

Printed Name: [Will Tosney](#)

Title: _____

Title: [Sr. Account Executive](#)

Date: _____

Date: [6/28/2023](#)

EXHIBIT A To:
REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY
CONTRACTS UNDER FEDERAL AWARDS (2 C.F.R. § 200.317):

W. Va. CSR § 148-1-5

West Virginia Code of State Rules
Title 148. Department of Administration
Legislative Rule (Ser. 1)
Series 1. Purchasing

W. Va. Code St. R. § 148-1-5
§ 148-1-5. Remedies.

Currentness

5.1. The Director may require that the spending unit attempt to resolve any issues that it may have with the vendor prior to pursuing a remedy contained herein. The spending unit must document any resolution efforts and provide copies of those documents to the Purchasing Division.

5.2. Contract Cancellation.

5.2.1. Cancellation. The Director may cancel a purchase or contract immediately under any one of the following conditions including, but not limited to:

5.2.1.a. The vendor agrees to the cancellation;

5.2.1.b. The vendor has obtained the contract by fraud, collusion, conspiracy, or is in conflict with any statutory or constitutional provision of the State of West Virginia;

5.2.1.c. Failure to honor any contractual term or condition or to honor standard commercial practices;

5.2.1.d. The existence of an organizational conflict of interest is identified;

5.2.1.e. Funds are not appropriated or an appropriation is discontinued by the legislature for the acquisition;

5.2.1.f. Violation of any federal, state, or local law, regulation, or ordinance, and

5.2.1.g. The contract was awarded in error.

5.2.2. The Director may cancel a purchase or contract for any reason or no reason, upon providing the vendor with 30 days' notice of the cancellation.

5.2.3. Opportunity to Cure. In the event that a vendor fails to honor any contractual term or condition, or violates any provision of federal, state, or local law, regulation, or ordinance, the Director may request that the vendor remedy the contract breach or legal violation within a time frame the Director determines to be appropriate. If the vendor fails to remedy the contract breach or legal violation or the Director determines, at his or her sole discretion, that such a request is unlikely to yield a satisfactory result, then he or she may cancel immediately without providing the vendor an opportunity to perform a remedy.

5.2.4. Re-Award. The Director may award the cancelled contract to the next lowest responsible bidder (or next highest scoring bidder if best value procurement) without a subsequent solicitation if the following conditions are met:

5.2.4.a. The next lowest responsible bidder (or next highest scoring bidder if best value procurement) is able to perform at the price contained in its original bid submission, and

5.2.4.b. The contract is an open-end contract, a one-time purchase contract, or a contract for work which has not yet commenced.

Award to the next lowest responsible bidder (or next highest scoring bidder if best value procurement) will not be an option if the vendor's failure has in any way increased or significantly changed the scope of the original contract. The vendor failing to honor contractual and legal obligations is responsible for any increase in cost the state incurs as a result of the re-award.

5.3. Non-Responsible. If the Director believes that a vendor may be non-responsible, the Director may request that a vendor or spending unit provide evidence that the vendor either does or does not have the capability to fully perform the contract requirements, and the integrity and reliability necessary to assure good faith performance. If the Director determines that the vendor is non-responsible, the Director shall reject that vendor's bid and shall not award the contract to that vendor. A determination of non-responsibility must be evaluated on a case-by-case basis and can only be made after the vendor in question has submitted a bid. A determination of non-responsibility will only extend to the contract for which the vendor has submitted a bid and does not operate as a bar against submitting future bids.

5.4. Suspension.

5.4.1. The Director may suspend, for a period not to exceed 1 year, the right of a vendor to bid on procurements issued by the Purchasing Division or any state spending unit under its authority if:

5.4.1.a. The vendor has submitted a bid and then requested that its bid be withdrawn after bids have been publicly opened.

5.4.1.b. The vendor has exhibited poor performance in fulfilling his or her contractual obligations to the State. Poor performance includes, but is not limited to any of the following: violations of law, regulation, or ordinance; failure to deliver timely; failure to deliver quantities ordered; poor performance reports; or failure to deliver commodities, services, or printing at the quality level required by the contract.

5.4.1.c. The vendor has breached a contract issued by the Purchasing Division or any state spending unit under its authority and refuses to remedy that breach.

5.4.1.d. The vendor's actions have given rise to one or more of the grounds for debarment listed in W. Va. Code § 5A-3-33d.

5.4.2. Vendor suspension for the reasons listed in section 5.4 above shall occur as follows:

5.4.2.a. Upon a determination by the Director that a suspension is warranted, the Director will serve a notice of suspension to the vendor.

5.4.2.b. A notice of suspension must inform the vendor:

5.4.2.b.1. Of the grounds for the suspension;

5.4.2.b.2. Of the duration of the suspension;

5.4.2.b.3. Of the right to request a hearing contesting the suspension;

5.4.2.b.4. That a request for a hearing must be served on the Director no later than 5 working days of the vendor's receipt of the notice of suspension;

5.4.2.b.5. That the vendor's failure to request a hearing no later than 5 working days of the receipt of the notice of suspension will be deemed a waiver of the right to a hearing and result in the automatic enforcement of the suspension without further notice or an opportunity to respond; and

5.4.2.b.6. That a request for a hearing must include an explanation of why the vendor believes the Director's asserted grounds for suspension do not apply and why the vendor should not be suspended.

5.4.2.c. A vendor's failure to serve a request for hearing on the Director no later than 5 working days of the vendor's receipt of the notice of suspension will be deemed a waiver of the right to a hearing and may result in the automatic enforcement of the suspension without further notice or an opportunity to respond.

5.4.2.d. A vendor who files a timely request for hearing but nevertheless fails to provide an explanation of why the asserted grounds for suspension are inapplicable or should not result in a suspension, may result in a denial of the vendor's hearing request.

5.4.2.e. Within 5 working days of receiving the vendor's request for a hearing, the Director will serve on the vendor a notice of hearing that includes the date, time and place of the hearing.

5.4.2.f. The hearing will be recorded and an official record prepared. Within 10 working days of the conclusion of the hearing, the Director will issue and serve on the vendor, a written decision either confirming or reversing the suspension.

5.4.3. A vendor may appeal a decision of the Director to the Secretary of the Department of Administration. The appeal must be in writing and served on the Secretary no later than 5 working days of receipt of the Director's decision.

5.4.4. The Secretary, or his or her designee, will schedule an appeal hearing and serve on the vendor, a notice of hearing that includes the date, time and place of the hearing. The appeal hearing will be recorded and an official record prepared. Within 10 working days of the conclusion of the appeal hearing, the Secretary will issue and serve on the vendor a written decision either confirming or reversing the suspension.

5.4.5. Any notice or service related to suspension actions or proceedings must be provided by certified mail, return receipt requested.

5.5. Vendor Debarment. The Director may debar a vendor on the basis of one or more of the grounds for debarment contained in W. Va. Code § 5A-3-33d or if the vendor has been declared ineligible to participate in procurement related activities under federal laws and regulation.

5.5.1. Debarment proceedings shall be conducted in accordance with W. Va. Code § 5A-3-33e and these rules. A vendor that has received notice of the proposed debarment by certified mail, return receipt requested, must respond to the proposed debarment within 30 working days after receipt of notice or the debarment will be instituted without further notice. A vendor is deemed to have received notice, notwithstanding the vendor's failure to accept the certified mail, if the letter is addressed to the vendor at its last known address. After considering the matter and reaching a decision, the Director shall notify the vendor of his or her decision by certified mail, return receipt requested.

5.5.2. Any vendor, other than a vendor prohibited from participating in federal procurement, undergoing debarment proceedings is permitted to continue participating in the state's procurement process until a final debarment decision has been reached. Any contract that a debarred vendor obtains prior to a final debarment decision shall remain in effect for the current term, but may not be extended or renewed. Notwithstanding the foregoing, the Director may cancel a contract held by a debarred vendor if the Director determines, in his or her sole discretion, that doing so is in the best interest of the State. A vendor prohibited from participating in federal procurement will not be permitted to participate in the state's procurement process during debarment proceedings.

5.5.3. If the Director's final debarment decision is that debarment is warranted and notice of the final debarment decision is mailed, the Purchasing Division shall reject any bid submitted by the debarred vendor, including any bid submitted prior to the final debarment decision if that bid has not yet been accepted and a contract consummated.

5.5.4. Pursuant to W.Va. Code § 5A-3-33e(e), the length of the debarment period will be specified in the debarment decision and will be for a period of time that the Director finds necessary and proper to protect the public from an irresponsible vendor.

5.5.5. List of Debarred Vendors. The Director shall maintain and publicly post a list of debarred vendors on the Purchasing Division's website.

5.5.6. Related Party Debarment. The Director may pursue debarment of a related party at the

same time that debarment of the original vendor is proceeding or at any time thereafter that the Director determines a related party debarment is warranted. Any entity that fails to provide the Director with full, complete, and accurate information requested by the Director to determine related party status will be presumed to be a related party subject to debarment.

5.6. Damages.

5.6.1. A vendor who fails to perform as required under a contract shall be liable for actual damages and costs incurred by the state.

5.6.2. If any commodities delivered under a contract have been used or consumed by a spending unit and on testing the commodities are found not to comply with specifications, no payment may be approved by the Spending Unit for the merchandise until the amount of actual damages incurred has been determined.

5.6.3. The Spending Unit shall seek to collect damages by following the procedures established by the Office of the Attorney General for the collection of delinquent obligations.

Credits

History: Filed 4-1-19, eff. 4-1-19; Filed 4-16-21, eff. 5-1-21.

Current through register dated May 7, 2021. Some sections may be more current. See credits for details.

W. Va. C.S.R. § 148-1-5, WV ADC § 148-1-5

End of Document

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Government Works.

EXHIBIT B To:
REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY
CONTRACTS UNDER FEDERAL AWARDS (2 C.F.R. § 200.317):

Prevailing Wage Determination

– Not Applicable Because Contract Not for Construction

– Federal Prevailing Wage Determination on Next Page



State of West Virginia – Office of the Foster Care Ombudsman

SMART Success for Public Sector Digital Services
(PSDS)



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- Evaluate the proposal for engaging INRY In a consulting assignment.

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Will Tosney
Account Executive
will.tosney@inry.com

- **Overview & About INRY**
- **SMART Success Proposal Overview**
- **SMART Success Proposal Details**
- **Next Steps**

Overview & About INRY

Delivering ServiceNow Value across Employee, IT & Customer Experiences



Trusted by over 150 companies. A few of our Customers...

Mayo Clinic	Intermountain Healthcare (SCL)	CommonSpirit Health	Shriners	St. Luke's	Memorial Health	Billings Clinic	Northwestern University
Kwik Trip	General Mills	Dollar General	Casey's	Vail Resorts	The Venetian Resort	Las Vegas Sands	Life Time Fitness
Aon	Sallie Mae	Western Union	Bridgewater Bank	Wabtec (GE)	Consumers Energy	Red Hat	Sun Country Airlines

INRY by the numbers

2011
Year founded

10
Top 10 ranked by ServiceNow

150+
Customers

400+
Projects

What our Customers like about us ...

1. Rapid Time to Value

2. Easy to Work With

3. INRY Assurance

Certified Secure

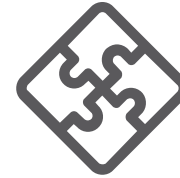


Fastest growing Company



What Are You Looking for, What Do We Bring

A typical SMART Success customer is [investing in ServiceNow](#) and looking for a partner who

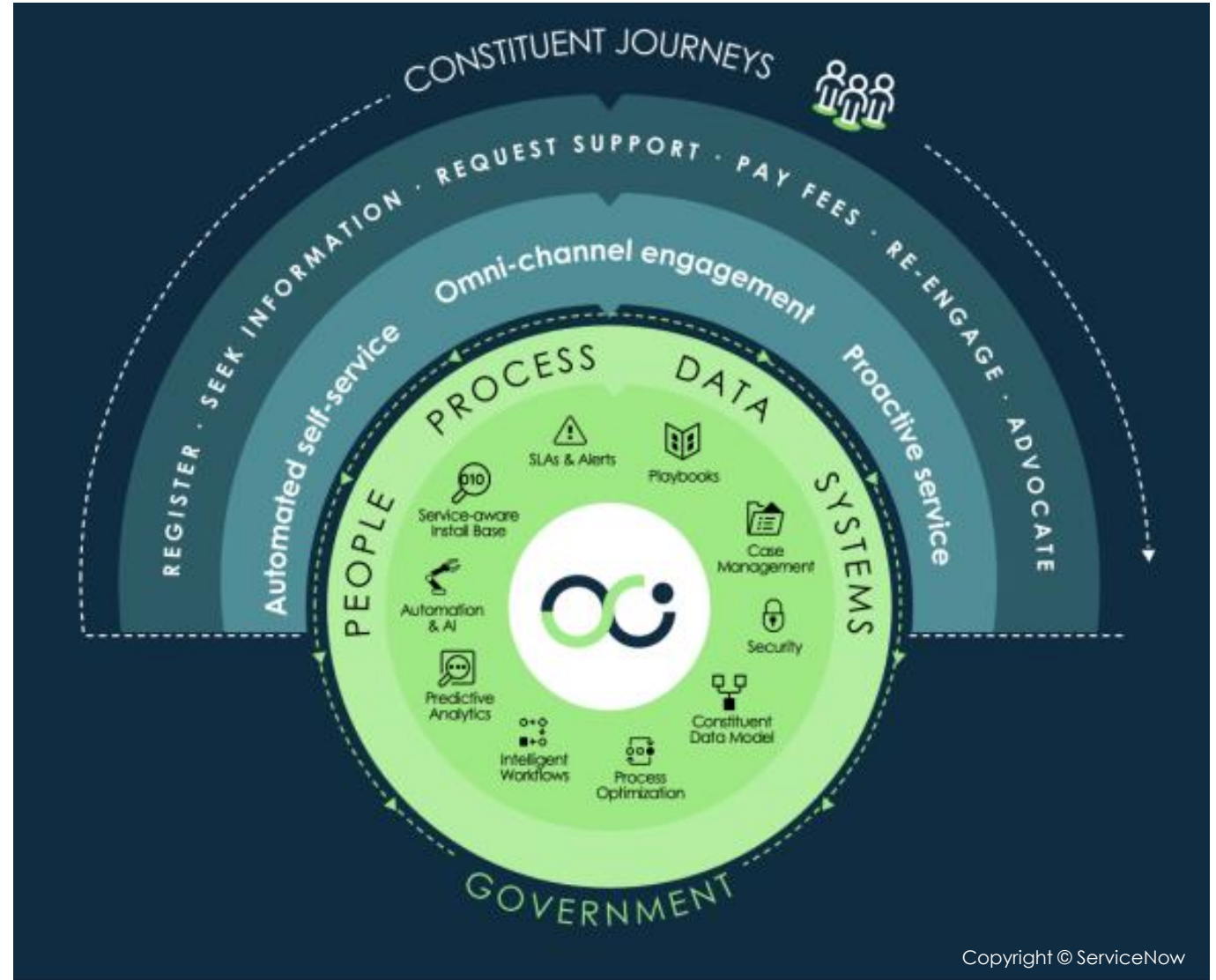




SMART Success Proposal Overview

Public Sector Digital Services (PSDS) Product Overview

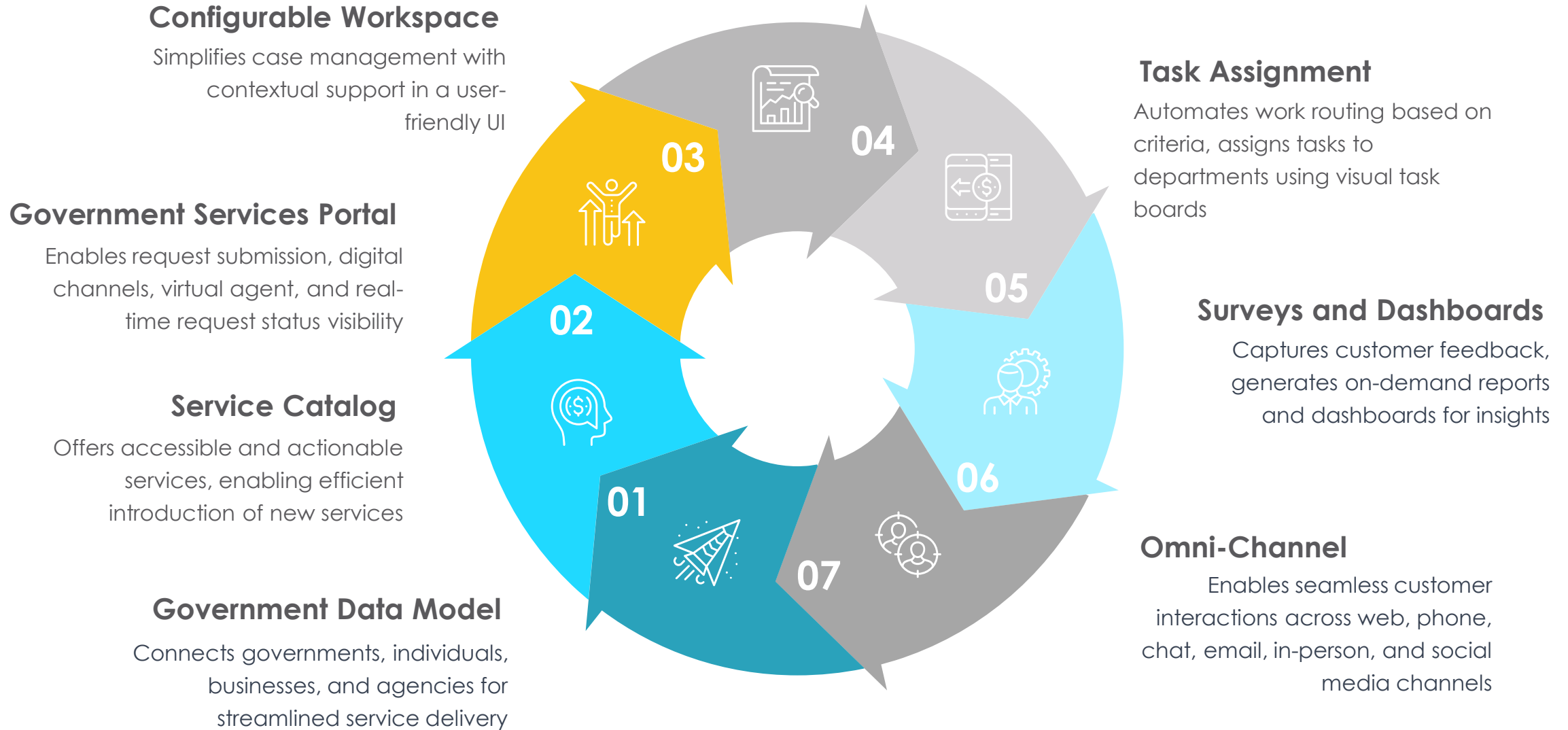
- ServiceNow PSDS addresses the challenges faced by governments in meeting the increasing demand for services and improving customer experiences.
- It enables governments to accelerate digital transformation, unify employees, processes, and systems, and deliver efficient and transparent services.
- PSDS offers a unified data model, low-code workflows, and experiences tailored for the government.
- It enables seamless customer interaction through multiple channels (mobile, email, phone, kiosks) and provides self-service options powered by AI.



Copyright © ServiceNow

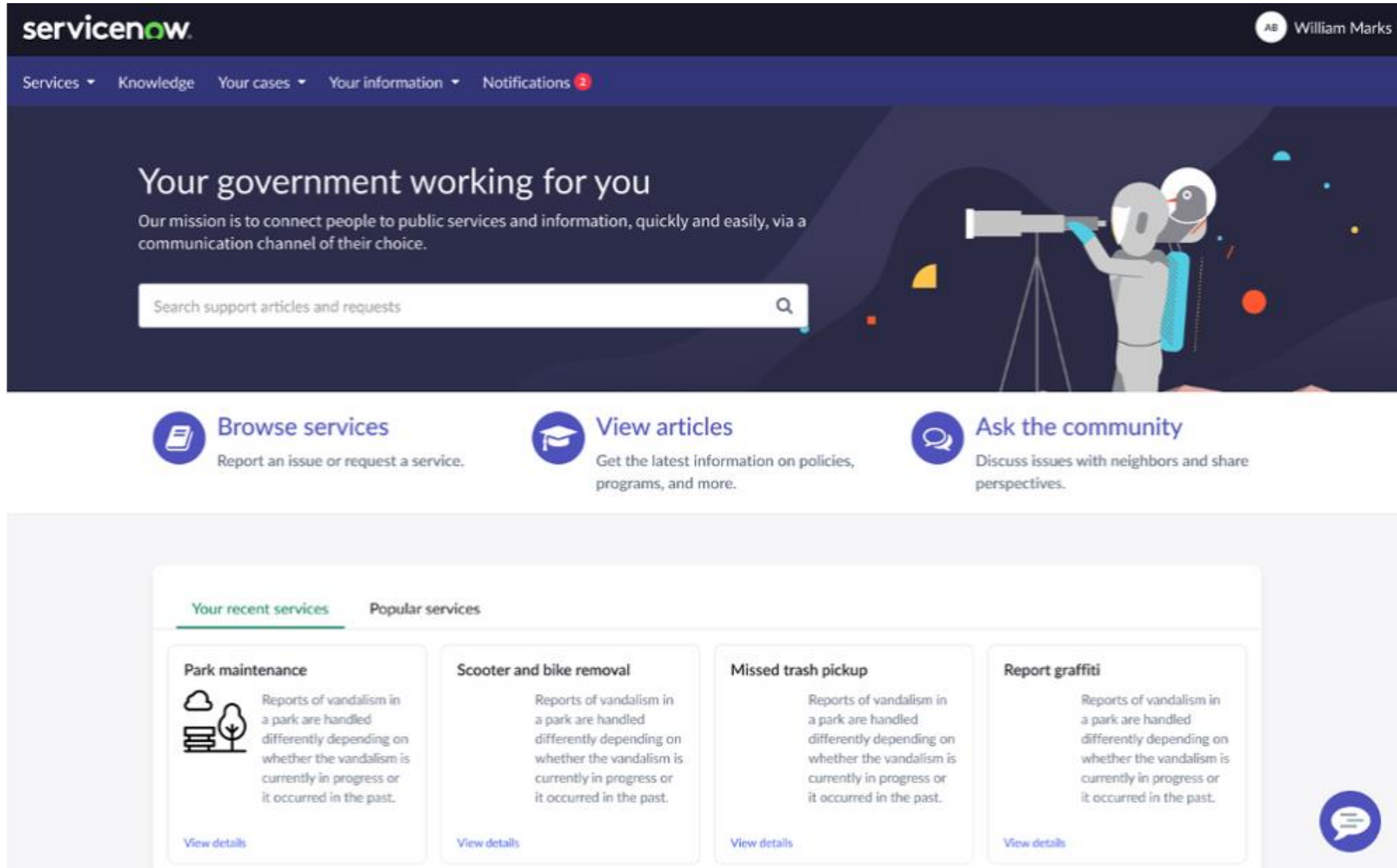
Unify government employees, processes, and systems on one digital platform

PSDS - Core Capabilities



Government Service Portal

A user-friendly and centralized web portal empowering citizens to access and request government services with ease and convenience.



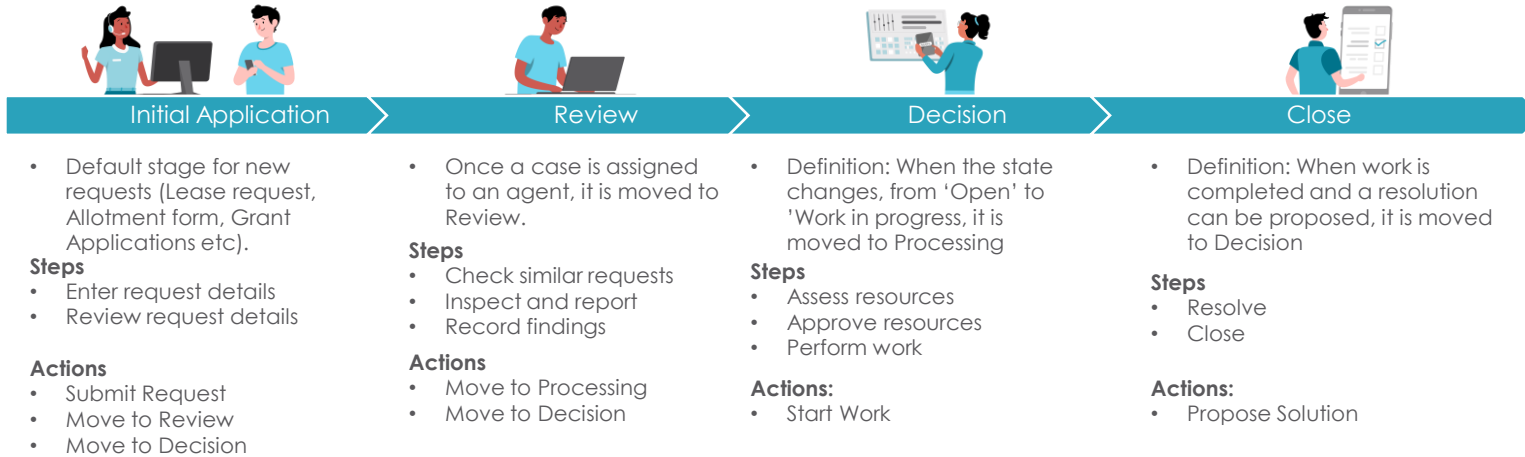
Configurable Workspace

A flexible and customizable workspace, enabling public sector organizations to efficiently manage citizen requests, complaints, and inquiries while tailoring the interface to their specific needs.

The screenshot displays a web-based interface for managing a citizen request. At the top, a breadcrumb trail shows 'List' and 'SER0001006'. The main header area includes the request ID 'SER0001006' and three action buttons: 'Save', 'Assign to me', and 'Simulate Diagnostics'. Below this, the constituent information is shown: 'Constituent: William James', 'Priority: 4 - Low', and 'State: New'. The interface is divided into several panels: 'Consumer' (showing 'WJ William James' and contact details), 'Timeline' (a horizontal bar chart from June to Wed 21), and 'Active SLA' (indicating 'There is no SLA defined'). A navigation bar at the bottom lists various tabs: 'Details', 'Tasks', 'Related Parties', 'Government Service Cases', 'Interaction', 'Task SLAs (1)', 'Escalations', and 'More'. The main content area is split into three sections: 'Case Information' (with expandable sections for Request Location, Application Information, Applicant Information, and Notes), a 'Compose' section for adding comments, and an 'Attachments' section containing a file named 'Case Information.docx' (303.4 KB).

Leveraging the Power of Platform for Public Sector

State and Local Governments **transform** their Services to **optimize, automate** and **increase** the speed of innovation to bring the consumer-like experience.



ServiceNow adoption with multi-phase deployment to achieve:

- Reduced paperwork for Citizens
- Well defined process and predictable SLAs
- Availability of 24x7 system to enable self-service
- Managing workload for Large and seasonal workforce
- Omni-channel experience for Citizens and Government staffs.

Public Sector Digital Service	Field Services	Human Resources	Facilities and Workplaces	Public Portal
<ul style="list-style-type: none"> Provide self-service options for 24x7 resolution of requests Provide single-system access to all public relationship information Empower agents to deliver more timely, proactive service Build a playbook for specific process types to streamline work 	<ul style="list-style-type: none"> Manage EVM device integration –(IoT) Workflow across assign work orders, start work, communication & coordination, mobile platform Reduced average service time, better leadership visibility with Dashboard. Delightful store experience 	<ul style="list-style-type: none"> Quick onboarding for seasonal staff for processes like Election Volunteer Management Removed high dependency on paper forms, spreadsheets etc, with consolidated HR Service Delivery Streamlined HR tasks across new hires, transfers, and promotions. 	<ul style="list-style-type: none"> Manage efficient workspaces for in-office and hybrid workers Right-size real estate investments to meet utilization Ensure facility security Provide a safe workplace Maintain and repair facilities based on both planned and unplanned requirements 	<ul style="list-style-type: none"> “Uber-like” experience Single portal for the public to interact with State and Local Government for issues, requests, etc. Routing & automation for Efficient and Agile fulfillers

TIME TO DELIVER

- **8 weeks** to production go-live

SOLUTION SCOPE

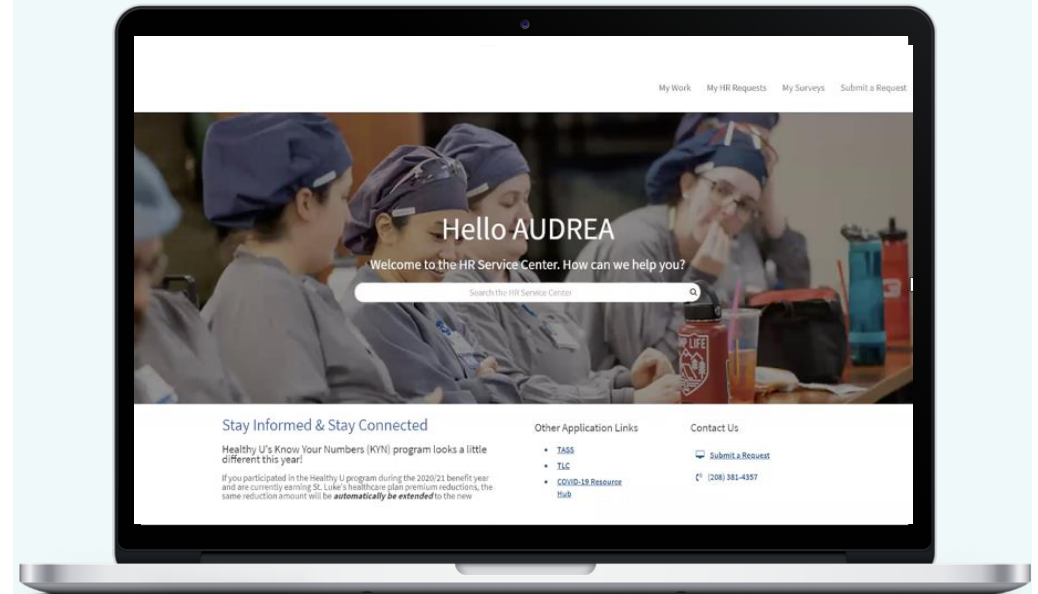
HRSD Pro solution that combined:

- An intuitive Onboarding portal embedded with electronic forms provides prospective hires a single place with all onboarding tasks.
- INRY's PASS methodology helped the client quickly start using ServiceNow. 300 seasonal employees were onboarded in spring and offboarded in fall.

BY THE NUMBERS

- **99 counties, 944 towns and cities** served

INRY helped Iowa DoT transform create a **smooth onboarding experience** for prospective hires while streamlining HR work.



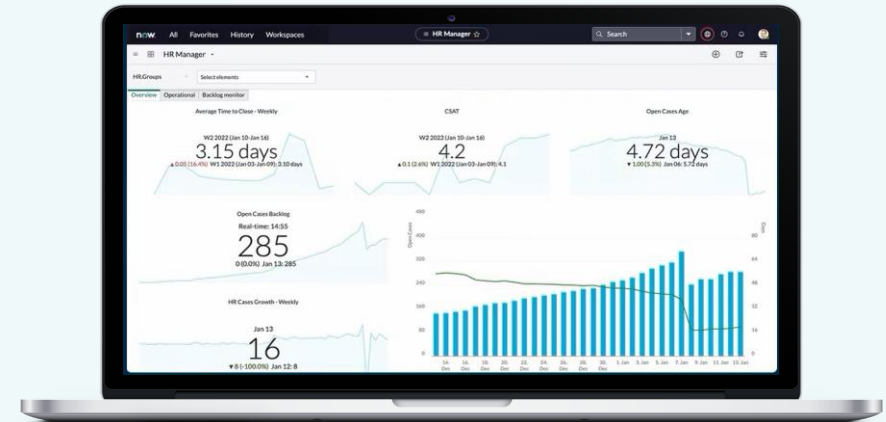
SOLUTION: HRSD AND EMPLOYEE RELATIONS/ LABOR RELATIONS

- **Employees should be able to submit cases anonymously** via any channel with all information stored electronically
- **Employee Center Pro**, Knowledge Management, Integration with SAP

INNOVATION / EXPAND:

- **INRY is building an app for Election volunteers. Bob Leek has promised to champion.** Time to reach out to City and State officials to gauge interest in the innovative solution for the 2024 election season
- Scalable and extensible to be used with additional Election support groups.
- Each group will have unique needs, data, reports, etc.
- Review volunteer's application review, approval, timekeeping, integration to SAP, security model, administrative function

Clark County Clark County is a dynamic and innovative organization dedicated to providing top-quality service with integrity, respect and accountability.



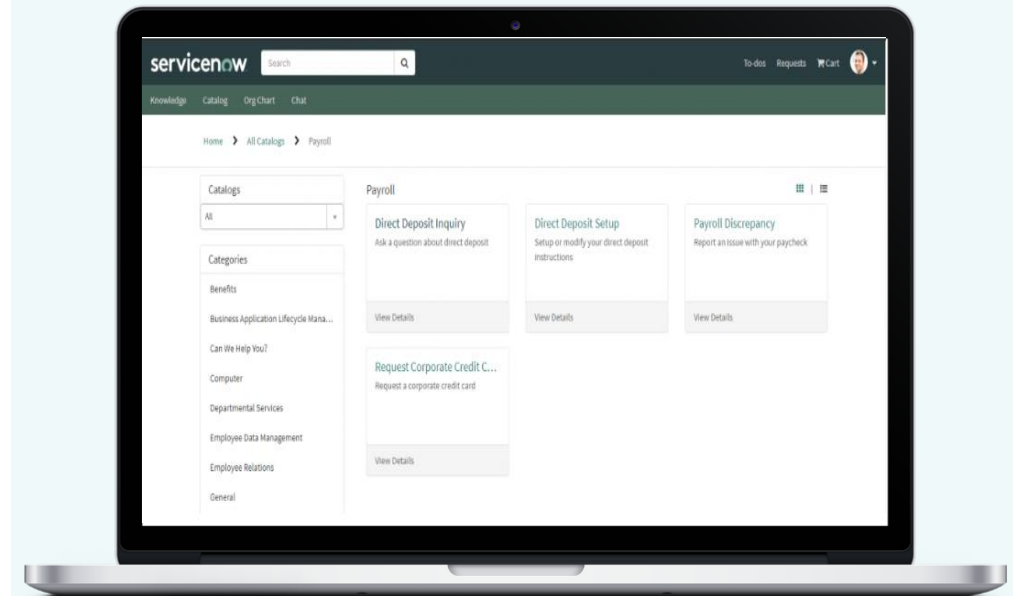
KEY OBJECTIVE

- Durham County was looking to improve its capabilities and capacity for **handling HR requests** by achieving a higher-value strategy and developing a model project.

SOLUTION SCOPE

- Our implementation of **HR Case Configuration, Knowledge Management, Employee Service Center, and Integration with SAP** streamlined Durham County's HR processes, resulting in improved efficiency and reduced response times.
- The measurable results included significant reductions in turnaround times for HR requests, leading to **increased employee satisfaction and improved productivity**. These solutions enhanced service delivery by providing a seamless and user-friendly experience for employees accessing HR services.

Durham County Increases its HR Capabilities



Statewide Case Management – Implementation details

1. Customer name: Iowa Department of Transportation

- Description: “With hundreds of seasonal employees hired every year, the HR team at the Iowa Department of Transportation faced challenges due to their manual, paper-based processes. with INRY's implementation of ServiceNow Iowa Department of Transportation achieves streamlined and paperless HR onboarding, reducing onboarding time from 4-6 hours to just 30 minutes.”
- Link to the success story: [Iowa DoT onboards and offboards hundred of seasonal employees with EASE](#)
- Contact details
 - Name: Anya Denning
 - Designation: IT Specialist at Iowa DOT
 - Contact: +1 515-233-7793
 - Email: anya.denning@iowadot.us

2. Customer name: Clark County

- Description: “INRY enables Clark County to implement ServiceNow HRSD, prioritizing Employee and Labor Relations with secure, anonymous case submissions across multiple channels.”
- Contact details
 - Name: Bob Leek
 - Designation: Chief Information Officer at Clark
 - Contact: +1 971-409-8956
 - Email: bob.leek@clarkcountynv.gov

3. Customer name: Durham County

- Description: “INRY empowers Durham County to overcome case management challenges through efficient and effective solutions, streamlining operations for enhanced productivity.”
- Contact details
 - Name: David Nicolaysen
 - Designation: Assistant CIO at Durham County
 - Email: dnicolaysen@dconc.gov

Customer Experience - Sample Stories

Delivering **E**fficient, **A**gile and **S**calable **E**xperiences (EASE)



Aon Health worked with INRY to transform their CSM to maximize growth and scale customer facing services across Aon



American Greetings modernized their customer service to resolve issues faster, identify root causes, and provide a consistent customer experience.



Casey's leveraged automation to streamline integrations, intelligently route Store Helpdesk cases between teams, and efficiently manage the workflow of field service executives



Through integrations and defined process, Kwik Trip improved how they supported its retail businesses using ServiceNow CSM and Vendor Management



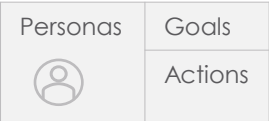

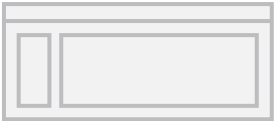
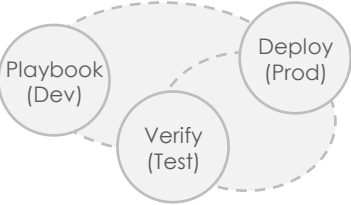

Using CSM's workflow capabilities, Bridgewater Bank was able to create a single location to handle loan, credit, and administration processes



Consumers Energy improved business operations through case workflows, knowledge articles, and integrations that resulted in reduced SLAs and better KPI tracking

PASS: Common Structure Built on ServiceNow

Predefined deliverables for each PASS. The content varies by product and business objectives

Workshops & Design	Rapid Configuration	User Acceptance Testing (UAT)	Deploy	Enablement & Adoption
				
<p>Method</p> <ul style="list-style-type: none"> ▪ Demo product ▪ Capture Customer needs that vary from OOTB 	<p>Method</p> <ul style="list-style-type: none"> ▪ Rapid Prototyping ▪ Configure development ▪ Show-me sessions ▪ Unit Testing 	<p>Method</p> <ul style="list-style-type: none"> ▪ Power users system testing 	<p>Method</p> <ul style="list-style-type: none"> ▪ Customer deploy ▪ Technical hand over 	<p>Method</p> <ul style="list-style-type: none"> ▪ Command Center ▪ CloudCover
<p>INRY Deliverables</p> <ul style="list-style-type: none"> <input type="checkbox"/> Approved user stories <input type="checkbox"/> Backlog for future phases 	<p>INRY Deliverables</p> <ul style="list-style-type: none"> <input type="checkbox"/> Dev instance configurations 	<p>INRY Deliverables</p> <ul style="list-style-type: none"> <input type="checkbox"/> Test instance configurations <input type="checkbox"/> Verified Stories <input type="checkbox"/> Backlog for changes 	<p>INRY Deliverables</p> <ul style="list-style-type: none"> <input type="checkbox"/> Production instance configurations 	<p>INRY Deliverables</p> <ul style="list-style-type: none"> <input type="checkbox"/> Issues list <input type="checkbox"/> Power users comfortable
<p>Customer Responsibilities</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identify and commit time for team and sponsors <input type="checkbox"/> Complete preparation requirements 	<p>Customer Responsibilities</p> <ul style="list-style-type: none"> <input type="checkbox"/> Participate in show-me sessions, verify functionality and align requirements 	<p>Customer Responsibilities</p> <ul style="list-style-type: none"> <input type="checkbox"/> Own end-to-end testing, identify issues and prioritize <input type="checkbox"/> Go-no-go decisions 	<p>Customer Responsibilities</p> <ul style="list-style-type: none"> <input type="checkbox"/> Deploy to production using INRY guidance <input type="checkbox"/> Post go live support for process & integrations 	<p>Customer Responsibilities</p> <ul style="list-style-type: none"> <input type="checkbox"/> Coach & mentor <input type="checkbox"/> Communications <input type="checkbox"/> Showcase success to drive adoption

OUR UNDERSTANDING

- **Office of the Foster Care Ombudsman (FCO)** seeks an Enterprise level Statewide Case Management System that would facilitate them to receive, investigate, monitor, assign, and resolve issues/complaints raised by foster children and foster parents.
- System requirements include reporting capability to analyze and interpret data pertaining to complaints and provide timely resolutions.
- Along with implementation vendor to facilitate user training, support services and periodic upgrades.
- Looking forward for a compatible Foster Care Case Management system that will blend in well with West Virginia's Office of technology's current OS.
- In requirement of a scalable and flexible system with Case Management, User Access Administration, and case creation via E-mail/ Public web form/ Portal.

BUSINESS GOAL

- Achieve transparency
- Provide swift resolutions and attain proactive service excellence.
- Enhance agent productivity
- Cater to needs of foster children and foster parents
- Gain visibility of cases through interactive dashboards

BUSINESS OUTCOME

- Complainant satisfaction on the quality of grievance redressal services
- Single record of truth (all information pertaining to a complaint present on the system record with linked electronic documents and activities)
- Reduction of repetitive manual effort through automated workflows
- Swift issue resolution of foster children/foster care parents
- Enhanced decision-making with real time reports and dashboard
- Insights into case trends and optimization of service delivery

SOLUTION SCOPE

- Case Management
- Knowledge Management
- Government Service Portal
- Reports and Dashboards

BY THE NUMBERS

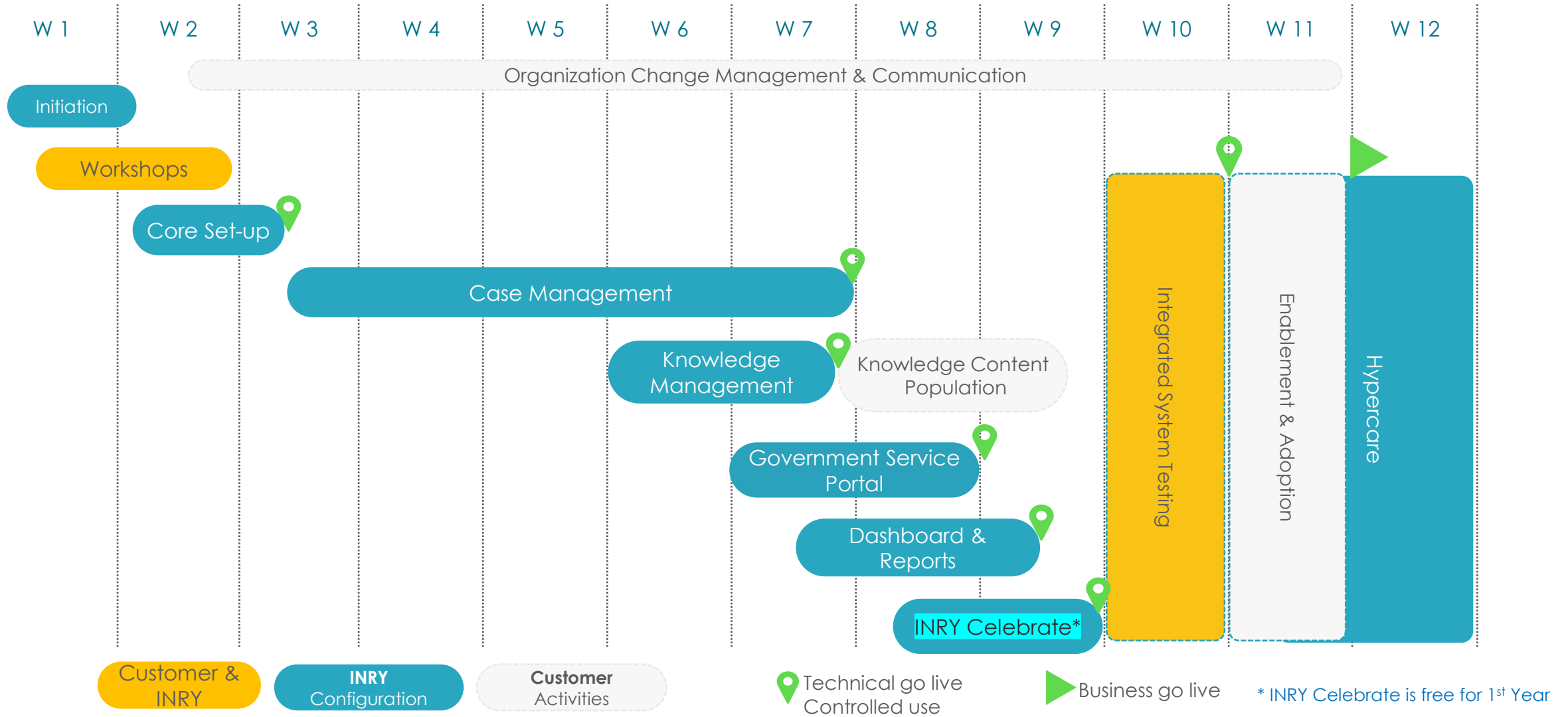
- Estimate: \$83,995
- Contract Terms: Fixed Fee
- Proposed Timeline: 3 months

KEY CONSIDERATION

- Quick implementation
- A subscription for Performance Analytics application is required for reports suggesting trends and analysis of historical point-in-time data.

Roadmap for PSDS SMART Success Using PASS Methodology

Highest probability of success based on similar Customers



Cost by Project Milestone

MILESTONE	DESCRIPTION	% DUE	AMOUNT
1	At Signature	30%	\$25,198.50
2	Completion of first workshop	20%	\$16,799.00
3	Completion of Integrated System Testing	30%	\$25,198.50
4	Go Live	20%	\$16,799.00
GRAND TOTAL			\$83,995

▶ SMART Success Proposal Details

PASS 1: Core Set-up

ServiceNow Products Implemented

SSO, LDAP, PSDS core data, User Administration

Business Outcome

Setup platform core to accelerate PSDS configuration

Key processes covered in the PASS:

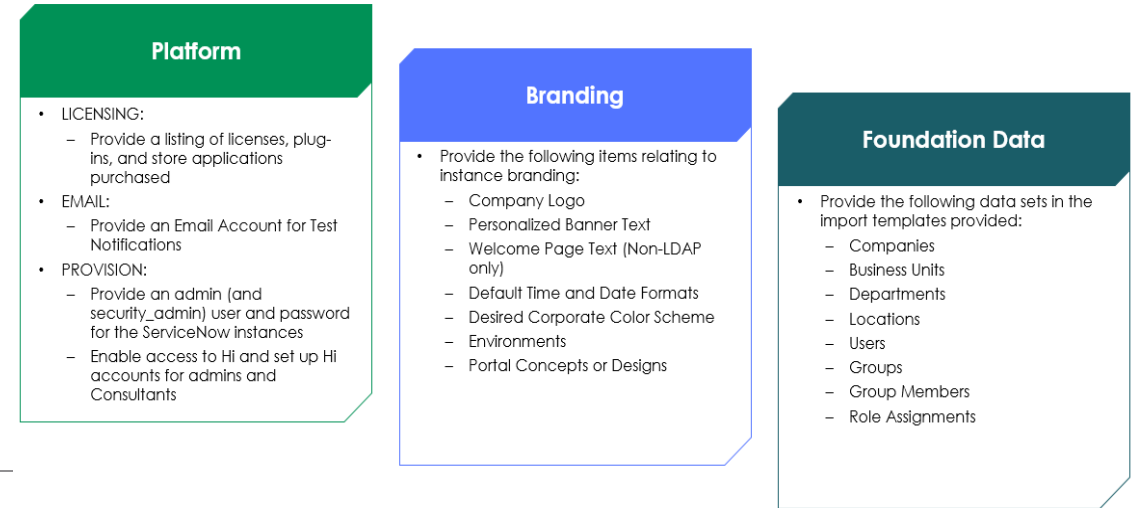
1. Instance core setup – Welcome Page, Company name, logo, theme
2. Activate PSDS-related plugins, ServiceNow support
3. Applications from ServiceNow Store (optional)
4. Email properties to send and receive emails from ServiceNow
5. Core Data Setup
 - Import user data using LDAP/ database extract
 - Setup SSO using OKTA/ alternate authentication mechanism to navigate seamlessly
 - User Administration – Users, Groups, Roles
 - Locations data administration – Company, Location, Department
 - Case table alignment
 - Account table alignment data load
 - Contacts table alignment data load
 - Consumer table alignment data load

Primary technical Configurations:

- Instance branding (color scheme and logo)
- Plugin activation / Store application install
- SSO Configuration / LDAP integration
- Core data import and setup – User hierarchy, Location hierarchy
- Setting up Account, Partner, Contact/ Constituent relationships
- Instance mailbox properties setup
- Check OOB tables configuration
- Default system time zone, date and time formats, schedules

Key Considerations:

1. Procurement of PSDS license for new ServiceNow instance
2. Working sessions with customer Platform Team on user data import and imported data validation
3. Permissions (user roles) setup and group memberships (Teams) for identified users
4. Engage platform team for ongoing Platform support



Configuration categories for platform core set-up

Customer PASS: Core Set-up

Objectives and any unique needs captured here for estimation and documenting the contract.
Detailed requirements for configuration will be captured and approved during the project as user stories.

Customer specific objectives and dependencies

1. Unique requirements currently not identified.

Customer specific estimates based on processes & configurations

Core Setup:

1. SSO configuration using OKTA, Azure, alternate providers etc.
2. LDAP/ AD integration for user data import
3. User administration setup for working on customer cases
4. Instance branding & logo update
5. Email properties setup (Mailbox)
6. Core tables alignment for data population
7. Name fields to include capacity to enter and store nicknames, appellations, and suffixes
8. Setup ServiceNow System Administrators to add, delete, change, or control user role-based security permissions by users or user group types, and access to all applications.

Core data:

1. Users
2. Roles, Groups (Members in the groups)
3. Locations
4. Schedules (Certain days/Weeks/Holidays)
5. External data entities – Businesses/ Accounts / Contacts/ Consumers
6. Internal data entities – Organizations/Departments (Hierarchy)
7. Set-up Account, Partner, Contact/ Constituent relationships

PASS 2: Case Management

ServiceNow Products Implemented

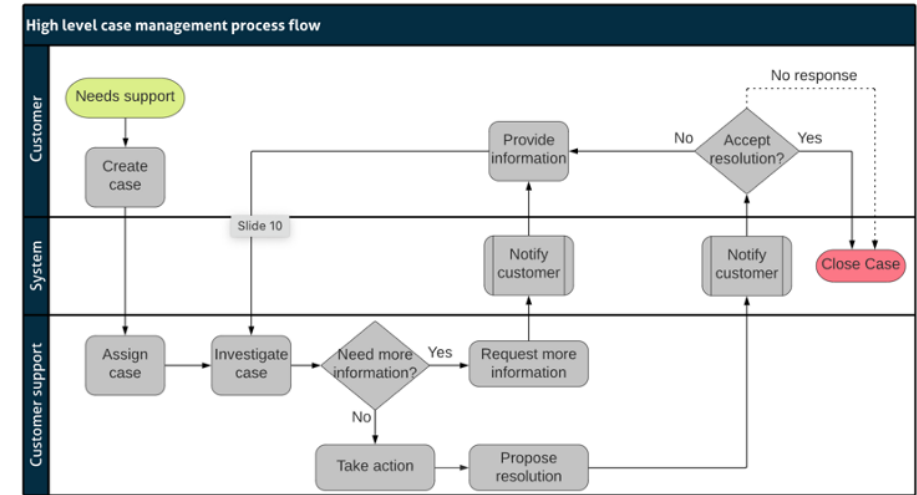
PSDS Case Management, Email Integrations, SLAs, Response Templates, Agent Workspace

Business Outcome

Boost agent productivity, issue resolution speed and increase complainant satisfaction

Key processes covered in the PASS:

1. Case management agent activities
 - Creation & Assignment
 - Case queue management
 - Working a case through its lifecycle (notes, case digests, SLAs, and agent workspace view)
2. Case related activities
 - The creation and usage of routing / assignment rules
 - Case task creation for division of work
 - Knowledge search from case and knowledge base for issue resolution
3. PSDS Administration
 - Usage of Assignment workbench
 - Playbook creation (if needed)
 - Case type creation
4. Dashboards and reports: Overview, Manager, PSDS Case, Reports, Scorecard



High level case management process flow

Primary technical Configurations:

- Case related: Case Types, Form & Record Producer, Contextual search, SLAs, Assignment rules
- Agent Workspace view
- Inbound actions for emails
- Email notifications, Customer service Survey
- Response Templates. "How to" document on creating response templates

Key Considerations:

1. Customer will identify the Case/Complaint handling Process Owner who is available throughout the engagement
2. Preparation of requirements include identifying common requests from the various teams handling complaints
3. Acclimatize Case Management team with the platform by handling cases
4. Knowledge use for PSDS will be demonstrated in this PASS but configurations captured in the Knowledge Management PASS

Customer PASS: Case Management

Objectives and any unique needs captured here for estimation and documenting the contract. Detailed requirements for configuration will be captured and approved during the project as user stories.

Customer specific objectives and dependencies

1. Casework data within a Google Sheet that needs to be imported into the system as cases. The Google Sheet file size is currently 5,023 KB in .csv format.
2. Support full case management workflow enabling 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.
3. Generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list.
4. System must support templates as form letters, fill-in form letters, customized form letters, or custom letters using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word.
5. System must support capability to create output in hard copy, paper letters, emails.
6. Customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.
7. 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.

Customer specific estimates based on processes & configurations

1. 1 Case Template
2. 1 Contextual search configuration for case
3. 1 Language(s) English US
4. 1 Form for General Request
5. 4 inbound email actions. The inbound email actions are per email
6. 1 Workflow for a general Customer request
7. 2 Service Level Agreements (SLA) for Response and Resolution
8. Support correspondence production including letter and email templates, then can be connect to workflows, can be auto populated with case record or person specific data, and can be transmitted and timestamped
 - 10 Email notifications
 - 10 Email response templates
9. 10 Advanced Work Assignment rules for case routing
10. Skill definition and Skill data upload
11. Quick search capability based on a single and or an advanced multiple field/filters
12. Chronological and reportable audit trail of activity by user and/or case, including a history of modifications to all data and event logs by record and/or user.
12. Document attachments to be associated with one or more person/case records, as well as complaints, notes, and other identifiers:
13. 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 (Enable users to use Reminder table)
14. Quick search feature to access recent cases.
15. Capability to determine whether a caller, a person, or case record already exists to avoid duplication.
16. Documentation of all formats to be storage within a case
17. Generate unique identifier for each case and navigate to a summarized view
18. 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. System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users
19. Monitoring functionality allowing progress to be monitored and alerts/reminders generated when workflow nears completion or needs approval.
20. Administrative development of data field labels, characteristics, and picklists. System must also enable users to search picklists using drop down menus.
21. Administrators to create workflow within the application
22. Specific list of favorites, such as searches, templates, and contacts
23. 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

PASS 3: Knowledge Management

ServiceNow Products Implemented

Knowledge Management

Business Outcome

Boost user productivity and organizational efficiency through shared information

Key processes covered in the PASS:

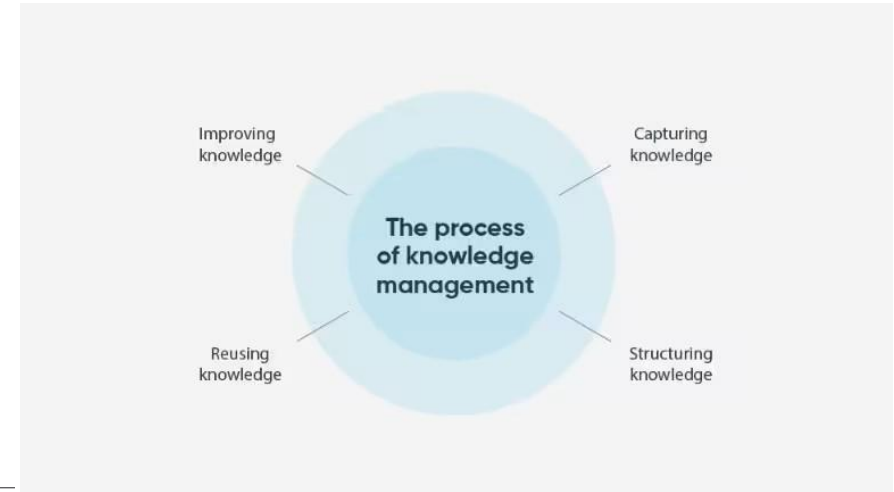
1. Access and dissemination of knowledge by Case workers to search, use in case, send to employees)
2. Usage and dissemination of knowledge by Constituents within Government Service Portal and notifications
3. Agent Assist
4. Content Lifecycle:
 - a. Article publishing and retiring lifecycle workflows and notifications
 - b. Feedback process and notifications
 - c. Article templates
5. Content optimization: knowledge chunks, content use metrics,
6. Content Access
 - a. User criteria for access and ownership
 - b. Knowledge Management ownership groups

Primary technical Configurations:

- Knowledge Bases (Constituent and Agent facing)
- Categories, Articles, Templates, Blocks
- Content management workflows
- Notifications, Ownership, Approvals, Access permissions

Key Considerations:

1. Preparation requirements include identifying common requests from Customers
2. Knowledge use for PSDS will be demonstrated in this PASS but configurations captured in the Knowledge PASS
3. The Client will identify the contact persons responsible for collecting, providing, and approving content for Knowledge articles
4. INRY team will review the provided article content and provide recommendations for authoring/imports



Continuous process of knowledge management

Customer PASS: Knowledge Management

Objectives and any unique needs captured here for estimation and documenting the contract.
Detailed requirements for configuration will be captured and approved during the project as user stories.

Customer specific objectives and dependencies

Unique requirements currently not identified.

Customer specific estimates based on processes & configurations

1. 2 Knowledge Bases (Agent and Constituent)
2. 2 Workflows (Publish and Retire)
3. 1 Language(s) English US
4. 2 Knowledge base access controls
5. 1 Article level access controls based on user profiles
6. 2 Ownership groups
7. 2 Article templates
8. Access to User Documentation

PASS 4: Government Service Portal

ServiceNow Products Implemented

Government Service Portal

Business Outcome

Establish a Government Service portal that unifies complainant activities

Key processes covered in the PASS:

1. Government Service Portal
 - a. Ability to search for knowledge and information
 - b. Create a complaint/case from the Government Service Portal
2. Case Management
 - a. Tracking case status
 - b. Attaching requested documentation

Primary technical Configurations:

- Branding, color scheme, and layout
- Knowledge Bases (End user / Complainant facing)
- Setup of Case

Key Considerations:

1. Preparation requirements include identifying branding and style sheets, anticipated navigational links, and homepage images and banner design

Customer PASS: Government Service Portal

Objectives and any unique needs captured here for estimation and documenting the contract.
Detailed requirements for configuration will be captured and approved during the project as user stories.

Customer specific objectives and dependencies

1. Access to administrator to update the look and content of the Portal.

Customer specific estimates based on processes & configurations

1. Government Service Portal branding with client logo, images, colors, and fonts.
2. Add out of the box widgets to the pages, which add additional required information.
3. Enterprise-wide announcements - with customized targeted audience to choose
4. Provide a public facing portal that enables modification of text size

PASS 5: Dashboard & Reports

ServiceNow Products Implemented

Performance Analytics

Business Outcome

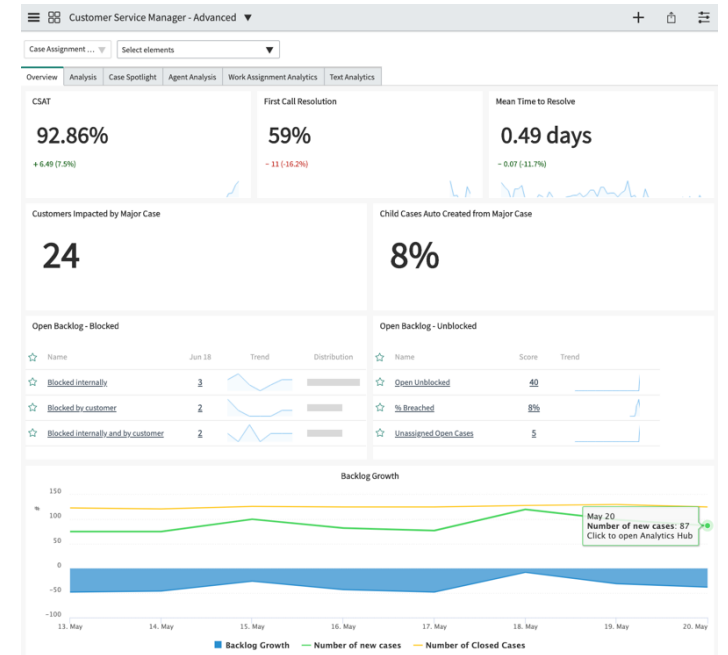
To report on performance trends and use data to support continual service improvement

Key Processes Covered in the PASS:

- Enable all OOTB widgets and dashboards
- Determine requirements based on design sessions (up to two (2))
- Determine the top metrics that are important to the leadership team
- To create and maintain the dashboards for future use

Primary Technical Configurations:

- Configure indicator sources to populate data for OOB indicators
- Create indicators to refine data into scores
- Create breakdown sources to specify which unique elements a breakdown contains
- Filter data into scores using breakdowns
- Use Analytics Hub to analyze Performance Analytics data, trends, targets, thresholds, and forecasts
- Create dashboards using Performance Analytics widgets
- Use bucket groups to visualize data and draw conclusions that are not obvious when looking at raw data



Key Considerations:

1. While INRY can include efforts to build PA customizations, we typically find stronger adoption and long-term success by enabling key client team members and start out using the out of the box capabilities and dashboards

Customer PASS: Dashboard & Reports

Objectives and any unique needs captured here for estimation and documenting the contract.
Detailed requirements for configuration will be captured and approved during the project as user stories.

Customer specific objectives and dependencies

1. Dashboards and reporting for performance, tasks, workload, and case monitoring across the enterprise by case, user, team, and/or enterprise.
2. Comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets

Customer specific estimates based on processes & configurations

1. Configure out of box reports up to 15
2. Remove unwanted reports from the out of box dashboard.
3. Define groups and users to provide visibility of the reports.
4. Configure up-to 5 custom reports using OOB capabilities
6. Allow report writers to create, publish, schedule, and distribute standard and ad hoc reports in varying formats including graphs and charts
7. Generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions.
8. Ad hoc report generator for enterprise management (Self-service report generation capability).

PASS 6: INRY CELEBRATE™ App Configuration

Products Implemented

INRY Celebrate™ (Std version)

Business Outcome

An application designed to foster an engaging culture, boost morale, recognize meaningful accomplishments with purposeful gestures and create unforgettable moments

Key Processes Covered in the PASS:

- Demonstrate Admin Module
 - Demonstrate Users, Groups or departments, and Roles set up
 - Demonstrate default system settings (time zone, date/time formats, etc.)
- Demonstrate Workflow Manager
- Demonstrate Alerts & Notifications that are available out of the box as part of the application that are supported during the configuration of tasks, workflows, status changes and event based (Scheduled or near real time notifications).
- Demonstrate Insights to showcase out of the box Reports and dashboards
- Demonstrate SSO, instance branding & email mailbox integrations

Primary Technical Configurations:

- Add Celebrate widget to EC/EC Pro Portal
- Configure Values and Skills
- Configure Users, Groups, and Roles set up
- Email mailbox integrations
- Workflows and Alerts configuration
- Dashboards and Reports configuration

Key Considerations:

1. Preparation requirements include providing details on branding, Users, groups and roles
2. To understand configurations required for Workflows, Alerts and Notifications mentioned in Key Processes Covered in PASS
3. Understanding Data needed for reporting

Customer PASS: INRY CELEBRATE™ App Configuration

Objectives and any unique needs captured here for estimation and documenting the contract.
Detailed requirements for configuration will be captured and approved during the project as user stories.

Customer specific objectives and dependencies

1. Value-based system:
 - a. Configure badges as per Client's requirement
 - b. Configure Skills as per the Client's requirement
 - c. Configure values as per Client's requirement
2. Workflow Manager
3. Alerts & Notifications
4. Reports
5. SSO, instance branding & email mailbox integrations

Customer specific estimates based on processes & configurations

1. Configure a value-based system for 1 Department
 - a) 5 Badges
 - b) 5 Skills
 - c) 5 Values
2. Configure Workflow for 1 Department:
 - a) 1 Workflow configured
 - b) 2 – 3 Stage Workflow
 - c) Role-based workflow access controls are configured as per the client-defined role hierarchy.
3. Configure Alerts & Notifications
 - a) Out-of-the-box alerts and notifications for workflow mentioned above and stages of workflows
 - b) Configuration of tasks, status changes, and event-based for 1 Department
4. Configure Reports
 - a) 1 Dashboard and configure 5 Reports for 1 Department
5. Configure SSO, instance branding & email mailbox integrations for Celebrate Std version

Enablement & Adoption

Ensure that the platform is being used effectively and objectives are met

Enablement through UAT: Customer shall identify Power Users – Users who handle cases/complaints/issues perform Complaint resolution processes. INRY shall conduct up to two (2) 8-hour working/enablement sessions with the Power Users to:

1. Create and assign Customer cases/complaints
2. Update and "work" customer cases/complaints through their lifecycle
3. Create case tasks to divide-and-conquer casework
4. Create and manage User/Case Worker and Complainant knowledge bases and knowledge articles
5. Create and schedule ad hoc reports
6. Creation and viewing of Dashboards
7. Adding attachments to cases
8. Usage of email templates for sending predefined responses from the case
9. Perform user access administration
10. Administration/ Maintenance of Employee Center and Government Service Portal
11. Usage of INRY Celebrate app for Employee recognition
12. Migrate pilot team to production – enable the power users to start utilizing the Case Management system in ServiceNow.

Adoption Services: ensure successful use of the platform

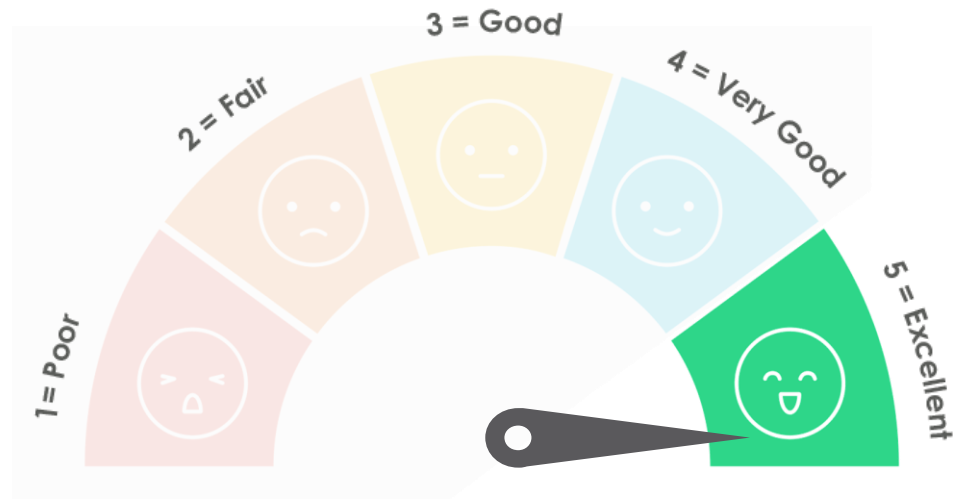
1. Provide up to a total of 24 hours remote support for the duration of post go live identified in schedule.
2. INRY team shall be available during pre-defined office hours and available for responding to Customer queries
3. Review Customer usage, recommend follow up roadmap and publish success story.
4. Provide 2 weeks of post Go Live support to fix any high/critical defects.

Key Considerations:

1. Knowledge transfer provides power users with enablement to utilize the functionality of the platform, without an understanding of how to properly utilize the platform organizations end up changing ServiceNow into a new platform to execute their old ways of working. Providing enablement ensures leveraging the investments in ServiceNow

Next Steps

We strive for 5!



Let us know if we are meeting your goals.
We outperform if you are happy and INRY
is here to make you successful !

Thank you !

#	Requirements	INRY Response	References
3.1.1	Enterprise level, Cloud-Based, statewide case management system which must be compatible with the West Virginia Office of Technology's current operating system, Windows 11	ServiceNow is a cloud-based platform that is accessed through a web browser and is compatible with multiple operating systems. Users can access ServiceNow from operating systems such as Windows, macOS, and Mobile Operating Systems ex- Android, iOS. Indeed, Statewide Case management system is compatible with the West Virginia Office of Technology's current operating system, Windows 11.	https://docs.servicenow.com/en-US/bundle/utah-release-notes/page/administer/navigation-and-ui/reference/browser-support.html
3.1.1.1	System must be modular to allow system upgrades and enhancements, must be scalable for increasing the number of licensed users and to support unlimited persons, cases, contacts, activity transactions, and reports.	ServiceNow platform provides modular capabilities and scalability to accommodate system upgrades, enhancements, and increasing number of licensed users. It supports unlimited persons, cases, contacts, activity transactions, and reports through its robust architecture.	https://docs.servicenow.com/bundle/utah-platform-user-interface/page/build/service-portal/concept/announcements.html
3.1.1.2	System must have administrative ability to create enterprise-wide announcements to be displayed on the user home page, which can be targeted to all users, or specific group users, or specific users. System must enable real time collaboration or access sharing with system users.	Enterprise-wide Announcements can be displayed on the Portal all/ specific user audiences. Real-time collaboration using virtual workspaces (can collaborate through work notes and/or through interaction records available in CSM Configurable Workspace) and access sharing through role-based access controls, allowing WV to foster effective communication and collaboration among its system users.	https://docs.servicenow.com/en-US/bundle/utah-government-industry/page/product/public-sector/concept/psds-gsp-resolving-case-tasks-agent.html
3.1.1.3	System must allow for speech to text functionality where applicable, and be accessible from laptops, desktops, and tablets.	ServiceNow currently does not provide support for speech-to-text functionality.	
3.1.1.4	System must provide the capability for authorized users to drill down to individual data elements in dashboard reports. System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task and case status monitoring by case, user, team, and/or enterprise.	The Reporting module within the ServiceNow platform can be utilized to achieve the requirement for authorized users to drill down to individual data elements within dashboard reports. Additionally, the module enables the creation of user, manager, and administrative dashboards for performance, workload, task, and case status monitoring at different levels, including by case, user, team, and/or enterprise.	https://docs.servicenow.com/en-US/bundle/utah-government-industry/page/use/application-content-packs/concept/psds-content-pack.html
3.1.1.5	System must provide a quick search capability based on a single and or an advanced multiple field/filters.	ServiceNow provides a robust global search functionality that allows users to perform comprehensive searches across the platform. https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/search-administration/concept/c_ZingTextSearch.html Additionally, users can leverage the filtering of results within list views to narrow down their results based on single or multiple fields/filters. Users can easily enter keywords or apply specific condition based filters to narrow down their search criteria. https://docs.servicenow.com/en-US/bundle/utah-platform-user-interface/page/use/using-lists/concept/c_Filters.html	Multiple reference links added inline in INRY Response column.
3.1.1.6	System must allow name fields must include capacity to enter and store nicknames, appellations, and suffixes.	ServiceNow supports the capability to enter and store nicknames, appellations, and suffixes within string fields, ensuring a comprehensive representation of the user's name.	https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/reference-pages/reference/r_DatabaseFieldTypes.html
3.1.1.7	System must maintain a chronological and reportable audit trail of activity by user and/or case, including a history of modifications to all data and event logs by record and/or user.	ServiceNow provides the "Activity log" feature on records that can be used to track and maintain a chronological and reportable audit trail of user activity and modifications. By leveraging the Activities (Activity log) feature, users can log and view the history of activities performed on a record, including modifications to data.	https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/form-administration/concept/c_ActivityFormatter.html
3.1.1.8	System must allow administrators to add, delete, change, or control user role-based security permissions by users or user group types.	WV ServiceNow System administrators can easily manage user role-based security permissions, through the User Administration module, administrators have the ability to add, delete, change, and control security permissions for individual users or user groups. https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/roles/concept/c_UserAdministration.html https://docs.servicenow.com/en-US/bundle/utah-platform-security/page/administer/contextual-security/concept/access-control-rules.html	Multiple reference links added inline in INRY Response column.
3.1.1.9	System must provide access to all applications and user documentation, vendor use, and help tool within a single site. System must integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs. System must allow document attachments to be scanned and associated with one or more person/case records, as well as complaints, notes, and other identifiers. System must allow documents to be thumbnail/first page previewed prior to full access.	ServiceNow's Case Management System and Government Service Portal serves as a centralized hub, offering employees access to applications, user documentation, vendor resources, and help tools within a single site. https://docs.servicenow.com/bundle/utah-government-industry/page/product/public-sector/concept/using-psds-government-service-portal-overview.html ServiceNow has integration capabilities that allow seamless integration with back-office systems, including versions of Microsoft Suite and Google Docs. ServiceNow allows for the seamless uploading of documents within its cloud-based case management system and associated with one or more person/case records, as well as complaints, notes, and other identifiers. ServiceNow currently does not have the capability to allow documents to be thumbnail/first page previewed prior to full access.	https://store.servicenow.com/sn_appstore_store.do#/store/application/87d1873db0d08850a451594e5e9619e6/1.1.0?referer=%2Fstore%2Fsearch%3Flistingtype%3Dallintegrations%25253Bancillary_app%25253Bcertified_apps%25253Bcontent%25253Bindustry_solution%25253Bboem%25253Butility%25253Btemplate%26q%3Dgoogle&sl=sh
3.1.1.10	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.	We can utilize the Government Service Portal in ServiceNow to prompt/display future date tasks, activities, calls, and follow-ups with role-based permissions. ServiceNow Notification enables the system to send automated reminders for future date tasks, activities, calls, and follow-ups	https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/task-table/concept/reminder-table.html
3.1.1.11	System must allow users to return to using a quick search feature to the three (3) most recently accessed records or activities. System must provide capabilities to determine whether a caller, a person, or case record already exists to avoid duplication. System must provide a means to merge identified duplicate records	In ServiceNow, the "History" section available on the Menu header dropdown displays a list of the most recently accessed records across different modules/applications in ServiceNow. ServiceNow incorporates built-in features to prevent duplication by checking specific fields when creating new records. For instance, when creating a new caller or person record, ServiceNow verifies if the unique key (email) already exists to avoid duplications. Similarly, when creating new cases, ServiceNow allows agents to check a caller's list of cases to ensure duplicate cases are not created. Currently ServiceNow does not provide native capabilities to merge identified duplicate records. This is a	
3.1.1.12	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. System must allow addresses to be United States Postal Service (USPS) validated. System must also allow entry of foreign addresses and characters. System must allow for APO (Military) addresses if individuals are deployed or stationed overseas.	The ServiceNow platform allows for the management of global records 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, ensuring that the data can be accessed and viewed based on specific roles and permissions. This means that different users can have different levels of access to the data based on their assigned roles. ServiceNow can integrate with the United States Postal Service (USPS) to enable address validation. It also supports the entry of foreign addresses and characters, accommodating international address formats. ServiceNow allows for the inclusion of APO (Military) addresses, by creating dedicated fields for APO addresses. The system can accurately capture and store this information for individuals who are deployed or stationed overseas.	https://www.usps.com/business/web-tools/apis/address-information-api.htm#_Toc110511818

3.1.1.13	System must allow retention/display of photographic images, audio and video files in their native format within contact records as needed. System must support documentation storage within a case or record, in all common formats including Portable Document Format (PDF), Microsoft Suite, Google Docs, etc. and must be document level searchable.	ServiceNow provides the capability to retain and display photographic images, audio files, and video files in their native formats within contact records. It also supports the storage of documentation in various formats such as PDF, Microsoft Suite, Google Docs, and more, allowing for easy access and retrieval. In addition to above, the system offers document-level search functionality through the Employee Document Management application, however this application requires a separate subscription.	https://docs.servicenow.com/en-US/bundle/utah-employee-service-management/page/product/human-resources/concept/hr-employee-doc-management.html
3.1.1.14	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 case or record. System must support full case management workflow enabling 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.	ServiceNow Case Management module enables the implementation of person and case-specific alerts when accessing a case/record through Info Messages, full case management workflow, and time tracking by status using Service Level Agreements. https://servicenowguru.com/scripting/ui-info-error-message-cheat-sheet/ https://docs.servicenow.com/en-US/bundle/utah-it-service-management/page/product/service-level-management/concept/c_SLADefinitions.html	Multiple reference links added inline in INRY Response column.
3.1.1.15	System must support automated or manual assignment of a unique case identifier upon creation of a new case. System must provide a way to navigate a case summary view. System must support correspondence production including letter and email templates, then can be connect to workflows, can be auto populated with case record or person specific data, and can be transmitted and timestamped.	ServiceNow has a unique case identifier, often referred to as a case number, which is automatically populated upon the creation of a new case. https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/field-administration/concept/c_ManagingRecordNumbering.html We can include a dedicated view on the EC Pro portal that displays case details. This view can provide a concise summary of the case, including key information such as case number, status, assigned agent, and important information if any. The following standard ticket page can be configured for caller cases in the PSDS product. https://docs.servicenow.com/bundle/rome-servicenow-platform/page/build/service-portal/concept/standard-ticket-page.html ServiceNow supports correspondence production by offering customizable letter and email templates that can be connected to workflows. These templates can be automatically populated with case records or person-specific data and can be transmitted and timestamps https://docs.servicenow.com/bundle/rome-servicenow-	Multiple reference links added inline in INRY Response column.
3.1.1.16	System must support the ability to generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list. System must support templates as form letters, fill-in form letters, customized form letters, or custom letters using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word. System must support capability to create output in hard copy, paper letters, emails, or Google Docs.	ServiceNow provides the ability to generate correspondence to individuals, groups, or predefined distribution lists. It supports various types of templates, including form letters, fill-in form letters, customized form letters, and custom letters using an integrated HTML editor. ServiceNow also enables the creation of output in different formats, including hard-copy paper letters, and emails. ServiceNow supports the capability to create output in hard copy, paper letters, emails, by default. For Google Docs a separate application is required. https://docs.servicenow.com/en-US/bundle/tokyo-application-development/page/administer/integrationhub-store-spokes/concept/gdocs-spoke.html	Reference link added inline in INRY Response column.
3.1.1.17	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. System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users. System must provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.	ServiceNow's Case Management capabilities enable users to add and manage notes, complaints, inquiries, tasks, calls, and other data within-person and case records. Role-based security permissions ensure appropriate access levels for viewing, adding, editing, and deleting information. ServiceNow supports role-based case assignment, task delegation, and case transfer, both individually and as a group, while customizable workflows streamline processes and automate the generation of related tasks. https://docs.servicenow.com/en-US/bundle/utah-government-industry/page/product/public-sector/concept/psds-gsp-resolving-case-tasks-agent.html https://docs.servicenow.com/bundle/rome-servicenow-platform/page/administer/workflow/concept/c_WorkflowOverview.html	Multiple reference links added inline in INRY Response column.
3.1.1.18	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.	ServiceNow provides the capability for the agency to attach an actual or estimated cost per activity unit to all activities within the workflow using input fields to store the cost. A custom field needs to be created to allow manual entry of the estimated/actual cost per activity.	
3.1.1.19	System must include monitoring functionality allowing progress to be monitored and alerts/reminders generated when workflow nears completion or needs approval.	WV can monitor real-time tracking of workflow progress through ServiceNow reports that provide a comprehensive view of the workflow status. Notifications can be used to generate alerts and reminders when specific milestones or approvals are approaching. By utilizing reports and notifications, users can effectively monitor workflow progress and ensure timely actions are taken from a single Dashboard hosting all required reports. https://docs.servicenow.com/bundle/utah-now-intelligence/page/use/reporting/concept/c_GenerateReports.html https://docs.servicenow.com/bundle/utah-now-intelligence/page/use/dashboards/concept/create-and-edit-dashboards.html	Multiple reference links added inline in INRY Response column.
3.1.1.20	System must provide means for administrators to update the look and content of the public facing portal and the administrator created content on associated weblinks.	Using ServiceNow's Government Service Portal user-friendly interface, WV administrators can update the look and content of the public-facing portal. Through Portal administration and configuration capabilities, administrators can easily customize the appearance and content of the portal pages. Additionally, administrators have the ability to manage and update the content on associated weblinks, ensuring that the information remains current and relevant. https://docs.servicenow.com/bundle/utah-government-industry/page/product/public-sector/concept/using-psds-government-service-portal-overview.html https://docs.servicenow.com/en-US/bundle/utah-government-industry/page/product/public-sector/concept/configure-psds-core.html	Multiple reference links added inline in INRY Response column.
3.1.1.21	System must provide a public facing portal that enables modification of text size and other page appearance qualities to comply with the Americans with Disabilities Act (ADA) standards as well as industry standard login/password requirements. System must provide a customizable web form incorporating a CAPTCHA response test.	ServiceNow offers Government Service Portal, which is a public-facing portal that can be configured to comply with the Americans with Disabilities Act (ADA) standards by providing options to modify text size (by using zoom in and zoom out) and other page appearance qualities to a certain extent like layout, color, branding, and styles. The platform also supports industry-standard login/password requirements to ensure secure access. https://docs.servicenow.com/bundle/utah-government-industry/page/product/public-sector/concept/using-psds-government-service-portal-overview.html Additionally, ServiceNow can provide a customizable web form incorporating a CAPTCHA response, it requires moderate configuration effort to setup the Re-captcha functionality. https://www.servicenow.com/community/developer-blog/google-recaptcha-in-service-portal/ba-p/2274506	Multiple reference links added inline in INRY Response column.

3.1.1.22	System must enable administrative development of data field labels, characteristics, and picklists. System must also enable users to search picklists using drop down menus.	ServiceNow allows administrators to customize data field labels, characteristics, and picklists to align with WV requirements. This includes defining field names, and properties, and configuring picklist (choice list) values. Additionally, users can conveniently search picklists using drop-down menus, making it easier to select the desired option from the available choices.	
3.1.1.23	System must allow automation of business practices of the agency and allow administrators to create workflow within the application. System also allows for users to set a specific list of favorites, such as searches, templates, and contacts. System must also provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets.	ServiceNow allows WV administrators to automate the business practices of the agency and create workflows within the application. Also, the platform provides users to set a specific list of favorites, such as templates and contacts. Users can favorite individual records such as templates, contacts or knowledge articles searched as part of their search activity. https://docs.servicenow.com/en-US/bundle/utah-platform-user-interface/page/get-started/servicenow-overview/concept/managing-your-favorites.html ServiceNow also offers comprehensive reporting and graphics capabilities, including standard reports and management reports for operational, performance, and outcomes analysis. The platform allows for conditions highlighting important variances to targets, providing valuable insights for decision-making. https://docs.servicenow.com/bundle/utah-now-intelligence/page/use/reporting/concept/c_GenerateReports.html https://docs.servicenow.com/bundle/utah-now-intelligence/page/use/dashboards/concept/create-and-edit-dashboards.html	Multiple reference links added inline in INRY Response column.
3.1.1.24	System must provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and level of detail required. System must provide for historical reports to show trends and comparisons between time periods. System must provide for generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions. System must provide a library of standard reports supporting common aspects of case management and investigatory practice. System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future reports. 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.	ServiceNow provides reporting capability that meets the requirements for generating comprehensive case reports. The system allows users to create pre-formatted reports tailored to the specific review or investigation type, reader, and required level of detail. Historical reports to analyze trends and make comparisons between different time periods can be generated using the Performance Analytics module in ServiceNow (requires separate subscription). ServiceNow offers a powerful ad hoc report generator that allows enterprise management users to create custom reports. But, the out-of-the-box reporting functionality does not provide a built-in capability to save specific report criteria for future use. The reporting engine enables report writers to create, publish, schedule, and distribute standard and ad hoc reports in multiple formats, including graphs and charts. https://docs.servicenow.com/bundle/utah-now-intelligence/page/use/reporting/concept/c_GenerateReports.html With role-defined permissions, users can schedule the generation and distribution of standard and ad-hoc reports at regular intervals. ServiceNow offers a library of standard reports that support common aspects of case management and investigatory practices. https://docs.servicenow.com/en-US/bundle/utah-platform-administration/page/administer/reference-	Multiple reference links added inline in INRY Response column.
3.1.1.25	System upgrades, enhancements, and error corrections must be at no additional cost/charge when such upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.	ServiceNow provides no additional cost/charge for system upgrades, enhancements, and error corrections. However, during system upgrades, it is possible that certain configurations may be skipped (due to configuration changes) and require manual review, correction and tested during the upgrade process. INRY's Annual CloudCover service can assist you during upgrades of the system to help identify and address any skipped configuration records, to ensuring a seamless upgrade in the future and optimal performance of the upgraded ServiceNow instance. https://www.servicenow.com/content/dam/servicenow-assets/public/en-us/doc-type/success/quick-answer/skipped-changes-review.pdf	Reference link added inline in INRY Response column.
3.1.1.26	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.	ServiceNow allows administrators to create a public-facing web form using the Government Service Portal that captures contact creating the case and additional case information. This data can be seamlessly populated into the case records, eliminating the need for duplicate data entry. https://docs.servicenow.com/bundle/utah-government-industry/page/product/public-sector/concept/using-psds-government-service-portal-overview.html ServiceNow email mailbox configuration can set up a dedicated email address, where incoming emails can be automatically captured and processed, populating/updating the relevant contact or case records. https://docs.servicenow.com/bundle/tokyo-servicenow-platform/page/administer/notification/concept/c_InboundEmailActions.html	Multiple reference links added inline in INRY Response column.