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Medical Licensure / Records Database Maintenance System

State of West Virginia



Department of Administration
Purchasing Division
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Post Office Box 50130
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State of West Virginia
Centralized Request for Proposals
Info Technology

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DEPARTMENT OF ADMINISTRATION
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DATE 11/17/2025

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

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1. COVER LETTER

Bharat Bhate
Founder & President
Consultadd Inc.

November 19, 2025

Larry D. McDonnell
Department of Administration – Purchasing Division
2019 Washington Street East
Charleston, WV 25305

Subject: Proposal Submission – Medical Licensure / Records Database Maintenance System- CRFP 0945 BOM2600000001

Dear Mr. McDonnell and the Evaluation Committee,

The West Virginia Board of Medicine plays a vital role in maintaining the integrity, safety, and transparency of healthcare licensure across the state. We recognize the increasing demands on the Board's systems - from managing complex licensing lifecycles to supporting public trust through secure, accessible digital services and appreciate the opportunity to offer a forward-looking solution that enables your team to do even more with confidence.

On behalf of Consultadd Public Services, a division of Consultadd Inc., we are pleased to submit this proposal in response to CRFP 0945 BOM2600000001. Our proposed system is designed to meet every technical, functional, and compliance requirement outlined by WVBOM while reducing operational burdens and improving user experience - for staff, applicants, and the public alike. At the center of our approach is a secure, cloud-based licensing platform built on Microsoft Dynamics 365 (Government Cloud), delivering streamlined workflows, real-time reporting, and scalable modules that adapt to the evolving needs of the Board.

Our team brings extensive experience implementing and supporting regulatory systems for public-sector agencies, including projects with licensing boards, health authorities, and case-driven compliance offices. We are fully authorized to deliver, license, and support the proposed Microsoft-based solution and remain committed to providing five years of secure hosting, system enhancements, and responsive technical support aligned with the expectations of the Board.

This proposal includes all required documentation, a completed Addendum Acknowledgement Form, and a separately sealed cost proposal per the RFP instructions. We welcome the opportunity to engage in further discussion or demonstration and look forward to contributing to WVBOM's ongoing mission of excellence in medical licensure and regulation.

Sincerely,



Bharat Bhate
Founder and President
Consultadd Public Services
publicservices@consultadd.com

2. EXECUTIVE SUMMARY

The West Virginia Board of Medicine plays a vital role in protecting the health and safety of the public through the oversight of medical licensure, disciplinary actions, and credentialing. To support this mission in an increasingly digital world, the Board has rightfully prioritized the modernization of its licensing, complaint, and documentation systems - moving away from fragmented legacy tools toward an integrated, efficient, and transparent platform. Consultadd Public Services is honored to present a solution tailored to meet this need, combining powerful technology with a deep understanding of regulatory operations.

Our proposed system is built on a secure, government-grade Microsoft platform that unifies licensing, renewals, disciplinary case management, and digital documentation within a single cloud-hosted environment. It is designed to reduce administrative burden, shorten processing times, and empower WVBOM staff and applicants through intuitive workflows, robust self-service features, and scalable architecture. Applicants and licensees will benefit from an online portal with secure login, real-time status tracking, document uploads, and digital credential delivery - while staff will gain a centralized view of all licensee activity, complaint records, and system-wide reporting tools.

Beyond just technology, Consultadd brings an implementation methodology that respects the nuances of government operations. Our phase-based rollout minimizes disruption, incorporates WVBOM's feedback at every stage, and ensures a smooth transition for staff and stakeholders alike. We offer full data migration from Oracle and other legacy systems, comprehensive training, and a structured hypercare period post go-live.

What sets us apart is our commitment to long-term partnership. Our support model includes SLA-backed helpdesk coverage, continuous system tuning, and enhancement planning, all delivered by a team with direct experience serving state boards and licensing authorities. We have designed this proposal with precision - estimating realistic licensing, infrastructure, and labor requirements based on WVBOM's size and complexity and providing transparent cost assumptions to ensure clarity from day one.

By selecting Consultadd, WVBOM will receive a solution that is not only compliant, secure, and scalable, but also purpose-built to enhance operational efficiency and public trust. We look forward to supporting the Board in its next chapter of digital transformation.

3. UNDERSTANDING OF WVBOM'S OBJECTIVES AND CHALLENGES

As the state's medical regulatory authority, the West Virginia Board of Medicine holds a vital responsibility in ensuring that only qualified and accountable professionals serve the people of the state. To meet that mandate effectively in today's environment, the Board must rely on systems that are not just functional but modern, secure, and adaptive. This RFP signals WVBOM's intent to replace the limitations of its current systems with a solution that offers long-term value and operational strength.

The table below outlines the agency's key challenges and the goals it is pursuing, along with how our proposed solution is purpose-built to help the Board overcome each pain point:

Current Challenges	Strategic Objectives	Our Action
No online application or renewal capability for most license types	Establish secure, web-based licensing workflows to reduce paper reliance and speed up processing	Deploy a unified self-service portal (via Power Pages) enabling end-to-end digital applications, renewals, fee payments, and document uploads
Fragmented handling of disciplinary complaints and investigations	Integrate complaint intake, evidence handling, and board review processes into one structured system	Implement a centralized disciplinary module in Dynamics 365 that tracks complaint lifecycle, timelines, documents, and outcomes
Manual workflows and inability to update forms, letters, or license templates without vendor involvement	Empower staff to manage workflows, notifications, and form content internally	Provide low-code/no-code configuration tools within the admin interface so staff can modify workflows, letter templates, and notifications without technical support
Delays in retrieving licensing data and generating reports	Improve system performance, searchability, and on-demand reporting	Use optimized Dataverse storage and Power BI reporting to enable fast data access, prebuilt dashboards, and ad hoc reporting tools for staff and leadership
Lack of a login-based portal for licensees or applicants to track their status or download credentials	Enhance transparency and reduce manual workload by enabling real-time application and license status checks	Deliver a secure member portal with Azure AD B2C authentication where users can view statuses, receive notifications, and print their cards or certificates on demand
Historical records not fully migrated from older systems and unavailable in search	Consolidate licensing history into one searchable and audit-ready system	Execute full data migration from Oracle and legacy sources, including indexing of scanned or structured records to ensure access and traceability
Small in-house IT footprint with limited capacity to manage complex infrastructure	Ensure usability, supportability, and maintainability without burdening internal staff	Deliver a fully managed cloud solution hosted on Azure Government Cloud, with ongoing support, documentation, training, and SLA-backed service desk

By addressing each of these critical pain points, our proposed solution empowers WVBOM to not only modernize its licensing infrastructure but also extend its mission of public protection through faster, more transparent, and more accountable digital services.

4. PROPOSED SOLUTION OVERVIEW

WVBOM's need for a unified, secure, and future-ready licensing system is both timely and essential. The current limitations affecting performance, usability, and configurability highlight the importance of moving to a modern solution that not only meets today's demands but also positions the agency to scale with evolving regulatory requirements. Our proposed solution delivers precisely that - a streamlined, Microsoft-based digital ecosystem that will enhance every stage of licensing, enforcement, and public access.

At the core of our solution is the Microsoft Dynamics 365 Government Cloud platform, integrated with Power Platform tools (Power Pages, Power Automate, Power BI), secured through Azure Active Directory and hosted in the Azure Government Cloud environment. This stack was selected not only for its compliance with state and federal standards, but also for its ability to offer WVBOM a seamless Software-as-a-Service (SaaS) experience, reducing technical overhead while maximizing control and flexibility.

The system will be modular and fully web-based, enabling WVBOM staff to manage credentialing, renewals, complaints, board workflows, and document handling through a single, intuitive interface. Through configurable dashboards, staff can track in-progress applications, initiate workflows, generate real-time reports, and update forms or templates without vendor assistance. Meanwhile, the member portal will provide applicants and licensees with secure access to track the status of their application or renewal, print wallet cards, upload documentation, or receive alerts - significantly reducing email and phone inquiries and improving transparency for users.

The public-facing portal will allow real-time license verification with downloadable disciplinary documentation and searchable fields, ensuring the public can easily access the information they need, anytime. All portals and administrative modules are mobile responsive, Section 508 aligned, and WCAG 2.1 AA compliant.

Security and compliance are foundational. The platform is hosted in Azure Government Cloud, offering FedRAMP High, HIPAA, and IRS-1075 aligned protections. All data is encrypted in transit and at rest using FIPS 140-2 standards, and role-based access is enforced through Azure Active Directory and B2C authentication. Audit trails and logging are embedded across all user actions thus supporting traceability, accountability, and regulatory readiness.

In short, this solution offers WVBOM a resilient, cloud-first foundation that centralizes licensing operations, simplifies user interactions, and ensures public trust through transparency, speed, and compliance. With built-in flexibility and robust vendor support, it is built to serve the agency's needs not just today, but well into the future.

FUNCTIONAL COMPONENTS AND THEIR PURPOSE

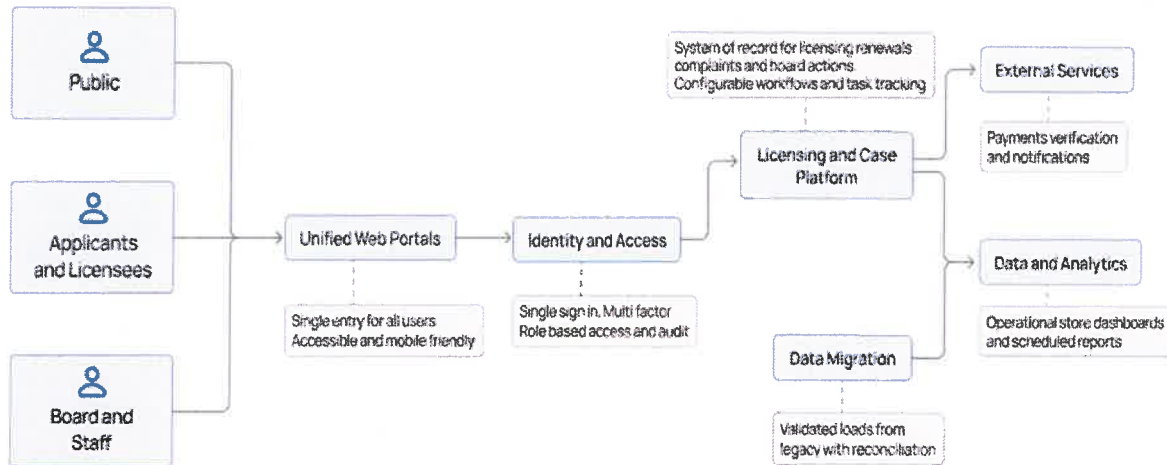
To meet WVBOM's objectives for modernization, integration, and public accessibility, our proposed system is composed of interoperable Microsoft technologies that together form a secure, modular, and low-maintenance solution. Each functional component is selected based on its proven fit for licensing, document control, public portal design, and secure data management within public-sector environments.

The following table outlines the key components and their purpose in the proposed solution:

Component	Technology Stack	Purpose in Solution
Core Licensing System	Microsoft Dynamics 365 Customer Service (GCC)	Serves as the central data and workflow engine for managing license applications, renewals, board actions, and disciplinary cases. Supports configurable workflows, automated notifications, and custom data fields for each license type.
Relational Data Storage	Dataverse (within Power Platform)	Stores all structured data including licensee records, renewal status, complaint metadata, and disciplinary outcomes. Enables relationship mapping across modules and ensures compliance with structured recordkeeping standards.
Workflow Automation	Power Automate	Powers license status updates, form routing, approval chains, deadline tracking, and task assignments. Minimizes manual handling and improves processing speed for both staff and applicants.
Document Management	SharePoint Online (GCC)	Provides secure storage and retrieval of licensee documents, complaint evidence, board communications, and certificates. Supports metadata tagging, versioning, and role-based access without additional licensing overhead.
Public and Member Portal	Power Pages	Enables applicants, licensees, and the public to securely interact with the system through web and mobile interfaces. Allows users to apply for licenses, check status, upload documentation, and download credentials without staff assistance.
User Authentication	Azure AD B2C	Manages identity and access for public-facing users including licensees and applicants. Supports secure login, self-service password recovery, and multi-factor authentication for added protection.
Role-Based Security	Azure Active Directory	Provides internal user authentication and fine-grained access control for WVBOM staff and board members. Ensures audit compliance and protects sensitive records by assigning users only the permissions necessary for their role.
Data Reporting and Analytics	Power BI Pro	Enables WVBOM staff to generate real-time dashboards, prebuilt reports, ad hoc queries, and daily financial summaries. Supports trend analysis for licensing activity, disciplinary actions, and workflow performance.
System Integration Layer	Azure Logic Apps	Facilitates secure and scalable integration with external systems such as the West Virginia E-Gov payment gateway, Federation of State Medical Boards (FSMB), and the Interstate Medical Licensure Compact.
Hosting Environment	Azure Government Cloud	Provides secure, U.S.-based infrastructure compliant with FedRAMP High, HIPAA, and IRS-1075 standards. Supports system scalability, high availability, and disaster recovery while minimizing infrastructure burden on WVBOM.
Audit Logging and Traceability	Dynamics 365 Audit Logs and Azure Monitor	Captures every key interaction including data edits, system access, document uploads, and workflow changes. Supports compliance reviews, internal investigations, and long-term accountability.

This technology foundation enables a seamless experience across all users - from applicants initiating a license to staff managing complaints or running reports, while maintaining complete security and compliance. By relying on Microsoft's government-grade architecture, WVBOM gains

a highly configurable system that requires minimal internal IT maintenance and is positioned for continuous improvement.



PROJECT GOALS AND OBJECTIVES

The West Virginia Board of Medicine has set out clear and actionable goals through this RFP. At the core is the desire to enhance licensing operations, streamline board workflows, and provide the public with better access to credential verification and disciplinary records. These goals must be realized through a platform that reduces operational burden, enables transparency, and ensures compliance with evolving state and federal requirements.

We are offering a modern, cloud-hosted licensing, case management, and document control system built entirely on the Microsoft Government Cloud stack. This includes Dynamics 365 Customer Service for licensing workflows and complaint tracking, Power Pages for public and applicant portals, SharePoint Online for document management, Power BI for real-time reporting, and Azure AD for identity and access control. This solution is designed as a Software-as-a-Service platform with full administrative functionality, user portals, and integration readiness from day one.

The system supports WVBOM's operational needs by introducing online license application and renewal workflows, task automation, real-time public licensee lookup, configurable letters and certificates, and internal dashboards that eliminate dependency on manual tracking or vendor support. Administrative users will be able to modify workflows, update forms, and run reports without custom development or IT intervention.

To ensure this modernization does not disrupt operations, our implementation approach includes a dedicated discovery phase, dual-system validation during migration, staff onboarding and training, and full archival of existing Oracle and legacy data. This phased approach will allow the Board to continue serving applicants and licensees without interruption during the transition.

The platform is inherently scalable, with capacity to handle new credential types, applicant volumes, and compact-based license pathways without significant rework. All services are secured through Azure Government hosting and identity layers, with encryption, audit logs, and access controls that meet HIPAA, WCAG 2.1 AA, and FedRAMP High standards. The user experience is designed to support the full range of WVBOM stakeholders - from a single applicant applying online to a board member securely reviewing a disciplinary case remotely.

This solution not only achieves WVBOM's goals but positions the agency with tools that enhance public trust, increase staff efficiency, and deliver regulatory services with the speed and transparency expected of a modern licensing authority.

DATABASE SYSTEM

WVBOM's licensing, credentialing, disciplinary, and regulatory functions rely on the ability to securely capture, organize, and retrieve information across all stages of the license lifecycle. To address current limitations and future-proof these functions, we propose a centralized and highly configurable database architecture built on the Microsoft Dataverse platform, integrated natively with Dynamics 365 Customer Service (Government Cloud).

This platform serves as the foundation of our solution, offering a structured relational database with integrated application logic, role-based access, and support for automated workflows. All licensee records, complaint history, credentialing actions, and supporting documents are stored in Dataverse tables that are fully aligned to WVBOM's data model and retention policies.

Workflows within the database are managed using Dynamics 365's business process flows and Power Automate logic, allowing WVBOM staff to move records through various stages such as application intake, review, approval, renewal, and board adjudication. Each data entity (e.g., physician, application, board order, complaint) is linked via relational keys, ensuring a complete and navigable record for every licensee.

Security is enforced using role-based access control configured through Azure Active Directory. Staff are granted permissions at the record and field level based on assigned roles such as Licensing Analyst, Board Secretary, or IT Coordinator. Audit trails are automatically generated for all record modifications, including changes to license status, user input, and workflow transitions. These logs are immutable, timestamped, and exportable for compliance reviews or internal audits.

Search and export capabilities are embedded throughout the system. Users can run filtered searches by name, license type, status, complaint type, or any custom field, with results appearing in sortable, configurable views. Export options include Excel, PDF, and CSV, allowing staff to download lists of pending applications, upcoming renewals, or board action history for reporting or offline analysis.

The system supports full-text indexing of both structured data and attached documents (e.g., PDFs, images, Word files), making it easy for staff to locate information across the entire dataset. Where necessary, metadata tagging and automated classification further improve discoverability.

Our proposed architecture is hosted in Azure Government Cloud, ensuring redundancy, scalability, and security. It supports backup and recovery procedures, access logging, and encrypted storage at rest and in transit, all in line with FedRAMP High and HIPAA requirements. It is

designed to scale with WVBOM's anticipated growth, enabling the addition of new license types or data entities without requiring a redesign of the system.

This database solution brings WVBOM a secure and responsive foundation to modernize its credentialing operations, simplify daily processes, and increase staff autonomy in managing data, workflows, and reporting needs. It replaces current constraints with a reliable and scalable system built to serve the agency and the public for years to come.

TASK MANAGEMENT

Efficient task management is essential to WVBOM's licensing and enforcement operations, especially with a lean staff structure and the need for flexibility in how work is distributed, escalated, and completed. Our proposed solution, built on Dynamics 365 Customer Service and Power Automate, gives WVBOM full control to create, assign, and monitor tasks without writing code or relying on technical teams for day-to-day adjustments.

The platform enables staff to manage internal workflows and task routing through an intuitive, drag-and-drop configuration interface. Common task-driven processes such as application review, disciplinary investigations, or credential renewals can be visually mapped using guided stages, rules, and triggers.

Key capabilities include:

- **Task Assignment**

Staff can assign tasks manually or automatically based on record status, license type, or form inputs. For example, a license application flagged for missing documentation can be automatically routed to a licensing analyst for review with a due date and reminder notification.

- **Workflow Customization**

Using built-in tools, staff can define multi-step workflows such as new license intake, complaint processing, or license reinstatement. Workflows can include conditional logic, deadline tracking, and automated escalation if tasks remain incomplete.

- **No-Code Configuration**

All workflows and task logic are configured through a user-friendly admin console. Staff with proper permissions can update task sequences, change form behavior, or edit notification templates - no coding or scripting is required.

- **Board Coordination**

Tasks that require board member review (e.g., disciplinary case reviews or reinstatement requests) can be assigned securely through role-based access, ensuring confidential documents are shared only with authorized reviewers.

- **Status Visibility**

Each task is tracked by owner, status, due date, and completion timestamp. Dashboards provide real-time visibility into open tasks by user or by licensee, helping supervisors balance workload and track turnaround times.

This model ensures WVBOM gains a responsive task engine that reflects real-world needs without introducing technical complexity. Staff can make changes quickly, adapt workflows as regulations evolve, and maintain full control over operational processes - resulting in a faster, more consistent licensing experience for all stakeholders.

AUDITING

Audit traceability is a fundamental requirement for WVBOM as a healthcare licensing authority, where user actions must be tracked and retained for legal, compliance, and operational reasons. Our proposed solution includes a comprehensive auditing framework built into the Dynamics 365 and Azure environment. It captures all user interactions across the licensing, complaint, document, and portal modules to maintain a verifiable chain of custody for every system action.

The audit log engine automatically records:

- Who performed an action, such as creating or updating a record
- What was changed, including field-level edits and workflow transitions
- When the action occurred, with timestamps in UTC and local time
- Which role or system area the action was performed under
- How the change was made, whether by a human user, system process, or integration

Every action taken on a licensee record, complaint file, document upload, approval decision, or public portal interaction is logged with a persistent system-generated ID. These logs cannot be edited or overwritten. They are retained for the full duration of the record's lifecycle in accordance with WVBOM's data retention policy.

All audit data is accessible to authorized administrative users via the Dynamics 365 interface and can be filtered by date range, user, entity, or action type. Logs can be exported for audit review, printed to PDF, or integrated into compliance dashboards via Power BI. For investigative purposes, the system can surface a chronological event history showing every interaction tied to a specific licensee or case.

Additionally, Azure Monitor and Security Center provide infrastructure-level audit trails covering authentication attempts, data access, and system performance metrics. These services enhance visibility into the full environment, supporting broader state-level IT governance or cybersecurity oversight.

This audit framework ensures that WVBOM meets its obligations for data integrity, public accountability, and regulatory compliance. It enables investigators, board members, and leadership to understand what occurred, when it happened, and by whom - without ambiguity or gaps.

REPORTING

Access to clear, accurate, and timely reporting is essential for WVBOM to manage licensing operations, financial oversight, complaint monitoring, and system performance. Our proposed solution includes robust built-in reports, configurable ad hoc report builders, and dashboard tools powered by Microsoft Power BI Pro and Dynamics 365.

The table below summarizes the key reporting features included in the system:

Reporting Category	Functionality	Details
Built-in Reports	Pre-configured reports for daily use	Daily financial summaries, license status counts, open/closed complaints, workflow status, and user activity logs
Ad Hoc Reporting	User-defined reports using filters and conditions	Staff can select fields, apply filters, group data, and export results without technical support
Financial Reporting	Transaction tracking and reconciliation	Integrates with E-Gov gateway, tracks payments by license type and date, supports refund and audit processes
Saved Views	Save and reuse custom report layouts	Users can save filtered views for frequent reporting needs such as upcoming renewals or pending investigations
Export Options	Download reports in multiple formats	Exports available in Excel, PDF, CSV for board reports or offline analysis
Dashboarding (Power BI)	Interactive visuals for agency management	Application KPIs, processing times, complaint resolution aging, system performance metrics
Security and Compliance	Role-based access and audit logging	Reporting access is restricted by user role and fully auditable within Azure and D365 environment

All reporting tools are directly embedded into the user interface and require no custom development or third-party tools. Reports can be scheduled or generated on demand, and are available to authorized users with appropriate access levels. Power BI dashboards offer visualizations that support data-driven decision-making and help agency leadership maintain visibility into core performance indicators. Our financial dashboards will include detailed daily reporting broken down by credential/license type, including application volume, payments received, and revenue summaries. These reports are filterable, exportable, and designed to align with WVBOM's reconciliation workflows and auditor requests.

This reporting architecture ensures WVBOM has the tools to stay informed, operate transparently, and respond confidently to internal needs, board requests, and public accountability standards.

DISCIPLINARY CASE MANAGEMENT

The ability to manage complaints, conduct investigations, and document disciplinary actions with consistency and legal precision is central to WVBOM's regulatory responsibilities. Our solution provides a dedicated disciplinary case management module within the Dynamics 365 platform that is fully integrated with the licensee record, ensuring that all complaint-related activities are tracked, secured, and auditable.

The system enables WVBOM staff to log complaints received from the public, agencies, or internal referrals. Each complaint is automatically assigned a case ID and linked to the appropriate licensee profile. From intake through resolution, all actions, documents, and decisions are tracked within a structured and role-based workflow.

Key capabilities are summarized below:

Functionality	Description
Complaint Intake	Staff can create new complaint records with source, date received, licensee involved, and initial description. Fields are customizable to match WVBOM intake processes.
Investigation Tracking	The system supports assignment of investigators, status updates, contact logs, deadlines, and escalation notes. Each investigation has its own timeline and status history.
Board Review Coordination	Secure access can be granted to board members to review case materials, vote on recommendations, and document decisions or required sanctions.
Document Storage and Linking	All evidence, correspondence, and orders (e.g., PDFs, audio, images) are uploaded to the complaint record or associated with the licensee's file through SharePoint Online.
Disposition Recording	Final resolutions such as dismissals, consent agreements, suspensions, or revocations are stored and can trigger automatic updates to the licensee's public record.
Deadline and Reminder System	Task reminders, investigation due dates, and board review deadlines are configurable with automatic email or in-app notifications.
Public Reporting Integration	If required, outcomes can be flagged for publication in the license verification portal, including downloadable disciplinary documents.

All complaint and disciplinary activity is fully auditable. Each step is logged with timestamps and user attribution, and reporting tools can generate summaries by complaint type, outcome, duration, or assigned staff. Staff can also create templates for common orders or notifications and track compliance with board-imposed conditions.

The solution ensures that WVBOM can handle disciplinary matters with consistency, legal defensibility, and minimal administrative burden. By embedding complaint workflows into the same platform used for licensing and renewals, the Board can maintain a complete picture of every licensee's history while enabling transparency, accountability, and secure access control at every step.

PAYMENT INTEGRATION

To support seamless financial processing for license applications, renewals, reinstatements, and other transactions, our solution includes full integration with the West Virginia State Treasurer's "E-Gov" payment gateway. This integration ensures that applicants and licensees can complete payment securely through the state's official portal, while also enabling WVBOM to maintain full transaction traceability, reconciliation, and reporting without manual intervention.

Our proposed architecture uses Azure Logic Apps and Power Platform connectors to interface with the E-Gov system over secure API endpoints. The integration process is designed around the following approach:

- **Transaction Initiation**

When an applicant completes an online form (application, renewal, telehealth registration, etc.), the system generates a payment instruction that includes fee type, amount due, and a unique transaction identifier. The user is then redirected to the E-Gov portal via a secure session handoff.

- **Payment Processing**

The applicant completes payment using the state's E-Gov interface. Upon completion, the E-Gov system returns a transaction status, confirmation number, and payment details to our platform through an API callback or secured payload.

- **Record Matching and Receipt Generation**

The system matches the returned payment confirmation to the original transaction request and updates the associated licensee record in real time. A receipt is generated for the applicant and stored in the license record. Staff can access full payment history and reconciliation views.

- **Financial Reporting and Reconciliation**

Payment data is automatically pulled into daily financial reports, including summaries by transaction type, license category, and date range. These reports align with WVBOM's accounting and audit needs and are exportable for sharing with the State Treasurer's Office if needed.

- **Error Handling and Failover**

If a payment fails or is incomplete, the applicant is notified immediately and the application remains in a pending status. Staff are alerted through the dashboard and can reinitiate the payment link if necessary. Duplicate payment protection and reattempt tracking are built into the workflow.

This model ensures that WVBOM staff are not responsible for managing cardholder data directly and remain aligned with PCI compliance protocols, since all payment details are handled externally through the state's established platform. At the same time, the system maintains real-time insight into each financial interaction, reducing manual reconciliation work and improving financial transparency.

All payment integration components are hosted in Azure Government and designed with fault tolerance, retry logic, and transaction auditing in place. This provides WVBOM with a secure, reliable, and compliant financial processing experience that aligns with state systems and staff expectations.

CLOUD-BASED DOCUMENTATION PROGRAM

The ability to store, manage, and retrieve licensing documentation securely and efficiently is essential to WVBOM's operations. From credentialing materials and board orders to evidence files and support documents, every record must be accessible to the right users without exposing sensitive content to unauthorized access or unnecessary risk.

Our solution includes a cloud-based documentation program built on Microsoft SharePoint Online (GCC), integrated directly with the Dynamics 365 platform. All licensee, complaint, and application-related documents are automatically linked to the appropriate record in the system and stored in a structured folder hierarchy with metadata indexing for quick retrieval.

Key features of the proposed document management module include:

- **Supported File Types**

Upload and storage of commonly used file formats including PDF, DOCX, XLSX, JPG, PNG, MP4, and scanned images. No conversions are required for preview or indexing.

- **Secure Upload and Storage**

Documents are encrypted in transit and at rest, with all storage hosted in Azure Government Cloud. Files are stored with record-level and role-based access restrictions that align with licensing or disciplinary workflows.

- **Role-Based Access Control**

Only authorized staff, board members, or system users can view, upload, or modify documents. Access rights are assigned by user role and record type, preventing unnecessary exposure to sensitive information.

- **Non-Download Preview Options**

Where required, the system can present files in a browser-based preview mode without download permissions, ensuring board members or reviewers can see documents without extracting them from the system.

- **Document History and Versioning**

The system maintains a version history for each file, tracking changes, updates, and deletions with full attribution. Rollback and restore features are available for authorized users.

- **Search and Tagging**

Staff can locate documents using full-text search, filters, and metadata tags (e.g., application ID, complaint number, file type). Folder structures are customizable and mapped to licensing stages or complaint types.

- **Retention and Archival**

Documents are retained according to WVBOM's data retention policy and archived automatically once a credential or disciplinary case is closed. Archived files remain accessible but are read-only and preserved for audit purposes.

This document system enhances transparency, safeguards confidentiality, and gives WVBOM full control over how records are stored and accessed - without requiring external platforms or additional software. It streamlines the flow of licensing and complaint materials, reduces reliance

on physical files or unsecured local storage, and prepares the agency for future audit and public record requests with confidence.

PORTAL ACCESS & FUNCTIONALITY

As part of WVBOM's modernization goals, secure and role-based portal access is essential for applicants, licensees, staff, board members, and the public. The proposed system includes both internal and external portals built using Microsoft Power Pages, integrated with Azure Active Directory and Azure AD B2C to control access based on user identity and role.

Each portal experience is tailored to the user's purpose while maintaining centralized control over authentication, permissions, and data visibility. All portals are mobile-responsive, browser-based, and aligned with WCAG 2.1 AA accessibility standards.

Key Portal Capabilities:

- **Secure Upload and Download**

Users can securely upload supporting documents (e.g., transcripts, certificates, complaint evidence) in formats such as PDF, DOCX, PNG, and JPG. All uploads are encrypted and directly linked to licensee or case records. Download permissions are role-based. For board members or external reviewers, documents can be restricted to view-only mode through embedded preview controls.

- **Access Restrictions and Permissions**

Portal visibility and access to records or documents are governed by the user's role. Internal staff can access full application files, disciplinary records, and workflow notes. Board members receive access to case materials only when assigned. Public users can only access verified public data and downloadable disciplinary documents.

- **Configurable Experience by Role**

The system allows WVBOM to define and manage different portal user types without custom development. The most common roles are shown below:

User Type	Access Scope
Public	License lookup, status verification, downloadable board actions if published
Applicants / Licensees	Submit applications, upload documents, track status, view correspondence, download credentials
WVBOM Staff	Full access to internal workflows, document handling, and task assignments
Board Members	Read-only access to assigned disciplinary case files, orders, and voting materials via secure dashboard

- **Session Security and Identity Management**

The portal uses Microsoft's identity management framework to enforce secure login, session timeouts, MFA (where applicable), and password recovery. WVBOM can manage account lifecycle settings and access policies centrally through Azure.

- **Audit and Activity Logs**

All portal interactions are logged and tied to specific user accounts, supporting accountability and compliance. WVBOM can generate reports on login history, document access, and form submissions.

By delivering a configurable and secure portal experience, the system ensures WVBOM can serve every stakeholder group with the appropriate access, while maintaining data protection and reducing staff workload. The ability to manage user roles and permissions directly gives the agency full control over how each part of the system is accessed and used.

APPLICATION/RENEWAL SYSTEM VIA WEBSITE PORTAL

For WVBOM to meet its public protection mandate while improving service accessibility, the application and renewal process must be secure, transparent, and fully online. Our proposed solution delivers a modern web portal experience using Microsoft Power Pages, designed specifically for credential holders and applicants to manage the full licensing lifecycle without paper forms or manual status checks.

The portal is mobile responsive, user-friendly, and integrated with backend workflows in Dynamics 365. It supports dynamic forms, role-based access, auto-save capabilities, and personalized dashboards, all secured through Azure AD B2C identity management.

Portal Experience Overview

Once an applicant or licensee accesses the website, they are guided through the following:

- **Login and Access**

Users create accounts using their email address, with verification and password recovery built in. Login is secured with optional multi-factor authentication. Returning users can access their personal dashboard from any browser or device.

- **Dashboard View**

Upon login, users are presented with a personalized dashboard showing license status, pending actions, outstanding documents, renewal timelines, and correspondence from the Board. The interface is customizable by license type and applicant status.

- **Application and Renewal Forms**

Users can complete new applications or renewals through intelligent forms that auto-populate where applicable. Forms support branching logic, dynamic field requirements, and validation to reduce errors. Required attachments such as transcripts or certifications can be uploaded directly.

- **Payment Integration**

Upon form submission, applicants are directed to the State Treasurer's E-Gov payment portal, then automatically redirected back upon successful payment.

- **Status Tracking**

Real-time status indicators let applicants know whether their application is under review, approved, returned for edits, or awaiting payment. Email and in-app alerts are generated automatically at key milestones.

- **Credential Downloading**

Once approved, the user can download a printable license certificate and wallet card directly from their dashboard. These documents are generated using configurable templates managed by WVBOM staff.

- **Secure Messaging**

The portal includes a secure communication feature where WVBOM staff can send updates, request missing documents, or deliver board decisions - all archived to the applicant's record.

This end-to-end portal experience dramatically reduces administrative burden, ensures applicants are informed at every step, and improves the speed and accuracy of application processing. With the ability to log in, track progress, and self-serve their documentation, applicants and licensees are better supported while staff gain back time to focus on higher-value regulatory work.

PORTAL FUNCTIONALITY

The proposed licensing portal provides applicants and credential holders with a secure, transparent, and intuitive interface to complete licensing tasks independently. All required features listed in §4.2.2.3.1 through §4.2.2.3.9 are fully supported within the Power Pages portal, integrated with Dynamics 365, Azure AD B2C, and SharePoint Online.

The table below summarizes each required function and how it is delivered within the proposed solution:

RFP Requirement	Functionality Provided
§4.2.2.3.1 – Account Recovery	Users can reset passwords through a secure, email-based recovery process. MFA and challenge-response options can be enabled for additional protection.
§4.2.2.3.2 – Address Verification	Applicants' addresses are validated using integrated verification services (e.g., USPS or Azure Location Services). Input fields include real-time suggestions and formatting validation.
§4.2.2.3.3 – Application Templates	Licensing forms are configured as reusable templates for each license type. WVBOM can update or clone templates without technical assistance.
§4.2.2.3.4 – Field Validation	All application and renewal forms include client-side and server-side validation. Required fields, format rules, date ranges, and logic dependencies are enforced to reduce errors.

§4.2.2.3.5 – Status Messaging	Users receive real-time updates on their application or renewal status via dashboard alerts, email notifications, and status indicators in the portal. Messaging templates are customizable.
§4.2.2.3.6 – Certificate/ID Downloading	Once a credential is approved, users can download a PDF license certificate and wallet card directly from their dashboard. Templates are managed by WVBOM staff.
§4.2.2.3.7 – Submission Capture (PDF)	Every application or renewal is saved as a PDF upon submission. These PDFs are attached to the user's license record and are accessible to staff for review or audit.
§4.2.2.3.8 – Board Staff Editing	Authorized WVBOM staff can modify submitted applications when corrections are needed. Edits are logged in the audit trail and reflected in the applicant's view with notes.
§4.2.2.3.9 – Audit Logging	All applicant and staff actions within the portal are recorded in an immutable audit log, including logins, submissions, document uploads, and communications.

This functionality ensures WVBOM delivers a fully modern licensing experience with complete traceability, real-time communication, and self-service access. Each feature has been designed to reduce staff workload while enhancing applicant satisfaction and overall system transparency.

DATA AND COMPLIANCE

Protecting sensitive licensing records, disciplinary case materials, and applicant information is essential to WVBOM's public protection mission. Our proposed system is designed with security and compliance at its core, ensuring that all data is handled in a manner consistent with HIPAA requirements, state data governance expectations, federal security frameworks, and WCAG accessibility standards. At every layer of the solution, safeguards are applied to maintain confidentiality, integrity, and audit readiness.

HIPAA Alignment and PII/PHI Safeguards

The system is hosted in Microsoft Azure Government Cloud, an environment built specifically for U.S. public-sector workloads and aligned with HIPAA and FedRAMP High security controls. This gives WVBOM a strong compliance foundation without requiring additional infrastructure or internal IT support.

Key protections include:

- **Encrypted Storage and Transmission**

All data is encrypted in transit (TLS 1.2+) and at rest (AES-256). This protects confidential information such as disciplinary notes, medical documentation, and applicant details.

- **Strict Access Controls**

Access to sensitive fields and documents is governed through role-based permissions in Azure Active Directory. Licensing analysts, complaint investigators, board members, and administrators only see information relevant to their role.

- **Session and Authentication Controls**

Administrative users authenticate using Azure AD, and public users authenticate through Azure AD B2C with optional MFA support.

- **Breach Notification Readiness**

Real-time monitoring through Azure Security Center alerts designated administrators of anomalous activity, supporting swift response in line with HIPAA expectations.

Accessibility and WCAG 2.1 AA Compliance

WVBOM serves a diverse audience of applicants, board members, and the public. To make the system equitable and accessible, all portals comply with WCAG 2.1 AA accessibility standards.

Accessibility features include:

- Support for screen readers (NVDA, JAWS)
- Keyboard-only navigation
- Clear color contrast ratios and scalable text
- Accessible form labels and error messages
- Testing using WAVE, Axe, and Microsoft Accessibility Insights
- Captions or transcripts for any video-based training content

This ensures all users can apply, renew, view records, and participate in processes without barriers.

Audit Logging and Data Integrity

Every interaction with the system is traceable. Immutable audit logs capture:

- Record edits and updates
- Workflow transitions
- Document uploads, downloads, and preview events
- User authentication activity
- Administrative changes to forms or workflows

Logs can be filtered, exported, and reviewed for compliance inquiries, internal audits, or legal requests.

Versioning is enabled for licensee records and documents, ensuring WVBOM can reference historical snapshots of applications, disciplinary documents, or correspondence.

Record Retention and Lifecycle Management

The system supports WVBOM's retention policies by allowing:

- Automatic archival of expired or inactive records
- Read-only access for archived materials
- Configurable retention timeframes by record type
- Controlled deletion workflows for outdated records
- Metadata tagging for improved search and organization

Expired or historical records remain accessible for audit or research without cluttering active workflows.

Hosting, Infrastructure, and Disaster Recovery

All system components are deployed in Azure Government Cloud, ensuring U.S.-only data residency and screened-personnel administration.

Infrastructure benefits include:

- 99.95 percent uptime SLA
- Redundant availability zones for continuity during localized disruptions
- Automated daily backups, stored in encrypted geo-redundant storage
- Disaster recovery capabilities through Azure Site Recovery
- Performance monitoring via Azure Monitor and Power Platform Admin Center

This hosting model aligns directly with WVBOM's requirement for long-term system reliability and secure access.

ONGOING MAINTENANCE AND SUPPORT

Long-term operational stability is essential to WVBOM's licensing and regulatory responsibilities. Our proposed support model ensures that the Board's staff will have consistent access to technical expertise, issue resolution, and system enhancements without added administrative complexity or dependency on in-house IT.

We provide full lifecycle support that includes helpdesk services, system maintenance, scheduled upgrades, and user documentation, all delivered within clearly defined service level commitments.

Our ongoing maintenance and support offering includes:

- **Helpdesk Support**

Direct access to a dedicated support team for WVBOM staff through email, phone, and ticketing portal. Support includes functional assistance, troubleshooting, configuration guidance, and usage help.

- **System Upgrades and Patches**

Automatic delivery of platform updates, security patches, and feature enhancements as released by Microsoft. These are applied in a test-first model with WVBOM's approval for any configuration-impacting changes.

- **Administrative Support**

Guidance and hands-on support for configuration changes, user access control, form updates, and workflow tuning as WVBOM evolves its operational practices.

- **Documentation and Knowledge Base**

Delivery of a tailored WVBOM user manual, video tutorials, and access to an online knowledge base for common actions, FAQs, and step-by-step processes.

- **Annual Health Checks**

Yearly system review with WVBOM staff to assess performance, identify improvement areas, and plan for any upcoming changes or regulatory shifts.

- **Post-Go-Live Support**

A dedicated hypercare phase (30–60 days) following go-live, where a support engineer is assigned to WVBOM for direct and rapid issue resolution.

Support Coverage Overview:

Support Area	Details
Service Hours	Monday to Friday, 8:00 AM – 6:00 PM Eastern (excluding state holidays)
Support Channels	Email, ticket portal, phone
Issue Prioritization	Tiered severity levels with response and resolution time commitments
Enhancement Requests	Accepted and prioritized based on impact and feasibility; reviewed quarterly
SLA Monitoring	Performance tracked against committed SLAs and reported quarterly to WVBOM

This model ensures WVBOM can rely on a responsive, knowledgeable support team that understands the agency’s operational needs and context. Staff will not have to navigate vendor bureaucracy or wait for general release cycles. Every support request is handled with accountability, transparency, and a shared goal of maintaining uninterrupted licensing operations.

5. IMPLEMENTATION APPROACH

Modernizing WVBOM's licensing and regulatory infrastructure requires more than just replacing software - it calls for a thoughtful, phased rollout that minimizes disruption, supports staff learning, and ensures all legacy data and workflows are preserved or improved. With this in mind, our team will deliver the solution through a structured, phase-based approach that emphasizes flexibility, transparency, and collaboration.

We follow an agile-inspired delivery model adapted for government implementations, allowing for stakeholder input, iterative validation, and early visibility into system behavior. Each phase is designed to reduce risk, clarify expectations, and ensure WVBOM's internal team remains fully informed and involved throughout.

Implementation Phases and Activities

Phase	Key Activities	Deliverables
1. Discovery & Planning	Requirements validation, legacy system review, user role mapping, integration planning	Finalized project plan, configuration workbook, data migration strategy, user profiles
2. Configuration & Development	System setup, license type creation, workflow design, form templates, document tagging, portal theming	Configured environments, role-based workflows, portal forms, complaint modules
3. Data Migration & Integration	Importing legacy and unmigrated records from Oracle and archives, E-Gov and FSMB integration	Populated test environment, migrated licensee records, API integration working connections
4. Testing & Review	Internal testing, UAT with WVBOM staff, defect resolution, performance tuning	UAT sign-off, test case logs, updated documentation, performance benchmarks
5. Training & Change Readiness	Admin training, staff walkthroughs, sample scenarios, process handbooks	Training materials, recorded sessions, helpdesk guides
6. Go-Live & Transition	Production deployment, final data sync, hypercare support initiation	Go-live checklist, system handoff, dedicated support availability
7. Post-Go-Live Support	30–60 day hypercare period with enhanced ticket prioritization and staff shadowing	Support reports, enhancement backlog, transition to standard SLA model

Agile Delivery & Stakeholder Checkpoints

Each configuration sprint will conclude with a stakeholder demo and feedback loop. These checkpoints will include:

- Biweekly sprint reviews and planning calls
- Shared access to a project tracking board (e.g., Azure DevOps or Jira)
- Collaborative resolution of open items
- Adjustment of priorities or configurations based on agency input

This delivery model allows WVBOM to see the solution evolve in real time, offer feedback, and gain confidence before go-live. It also gives the team early exposure to the tools they'll be using, reducing the learning curve and improving adoption.

By combining structured implementation phases with agile review points and clear workplans, we ensure WVBOM receives a system that is fully aligned with its business needs, delivered in a way that respects its operating environment, and ready to support its mission from day one.

TIMELINE AND MILESTONES

Delivering a fully functional, modern licensing system for WVBOM requires clear planning, defined milestones, and realistic pacing. Our proposed implementation will span approximately 18 months from contract execution to full stabilization. This allows sufficient time for collaborative configuration, thorough data migration, agency testing, and staff readiness.

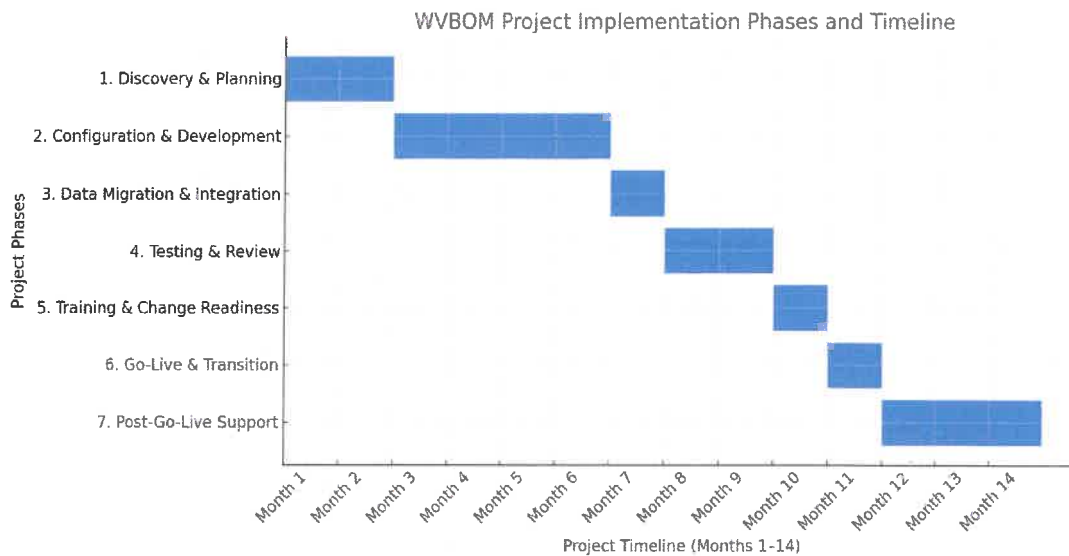
The plan is structured to balance momentum with flexibility, offering early functionality previews through agile demos and incorporating stakeholder feedback throughout.

High-Level Timeline and Key Milestones

Month	Phase	Key Milestones and Deliverables
Months 1–2	Discovery & Planning	Finalized project charter, requirements confirmation, system design document, legacy system analysis, data migration and integration strategy
Months 3–6	Configuration & Development	Licensing workflows, complaint modules, disciplinary templates, staff role setup, Power Pages portal design, FSMB and E-Gov integration framework
Month 7	Data Migration – Phase 1	Test data import from Oracle, mapping validation, archival record indexing, feedback and cleanup plan
Months 8–9	User Acceptance Testing (UAT)	Staff-led testing of licensing forms, disciplinary case flows, document uploads, and status messaging. Issue logging and refinements applied
Month 10	Final Data Migration & Portal Readiness	Final sync of licensee and disciplinary data, live configuration of portal for real users, permissions verified
Month 11	Training & Documentation	Admin and staff training, role-based walkthroughs, board member overview sessions, helpdesk preparation
Month 12	Go-Live	Production environment deployment, credentialing system activated, public/member portal launched
Months 13–14	Hypercare & Support Transition	Dedicated support team available with prioritized ticket handling, issue remediation, performance review checkpoints, handoff to long-term SLA-based support model

Each milestone is associated with clear deliverables and stakeholder sign-offs to maintain transparency and alignment throughout the project. The timeline also includes buffer space between major phases to accommodate feedback, testing cycles, or schedule variances.

This delivery rhythm gives WVBOM the confidence that critical services will not be disrupted, that every user group will be trained and supported, and that the agency has time to build internal comfort with the system before full public adoption.



GOVERNANCE AND STAKEHOLDER COMMUNICATION

Successful implementation for WVBOM requires not only a structured delivery plan but also a communication framework that keeps every stakeholder aligned, informed, and confident from start to finish. Our governance model ensures that project leadership, agency staff, and technical teams are continuously connected through clearly defined roles, reporting checkpoints, and responsive decision-making mechanisms.

We will establish a joint project governance structure made up of implementation leadership, WVBOM stakeholders, and support liaisons with meetings, tracking tools, and dashboards designed to keep everyone in sync across planning, execution, and post-go-live phases.

Joint Steering Committee

A dedicated steering committee will be formed during project initiation. This committee will include WVBOM executive leadership and designated department heads, along with Consultadd's Project Manager and Solution Architect. This group will meet monthly (or as needed) to:

- Review status reports and milestone progress
- Approve key phase transitions or scope changes
- Evaluate risks, issues, and mitigation plans
- Track go-live readiness and stakeholder satisfaction

Weekly Standups

Our delivery team will facilitate weekly standups with the WVBOM project team during active configuration, testing, and migration phases. These sessions will:

- Confirm workstream progress and blockers
- Track sprint outcomes and demo feedback
- Align action items between technical and operational teams

- Reduce risk of schedule slippage by ensuring real-time visibility

Monthly Governance Reviews

In addition to the Steering Committee, we will conduct monthly reviews focused on:

- Cross-functional alignment (licensing, IT, disciplinary, training)
- Key decision logs and risk registers
- Configuration decisions pending stakeholder input
- Updates on support readiness and transition milestones

Project Tools Used

To streamline communication and track progress transparently, we will use the following tools:

- **Azure DevOps or Jira:** For sprint planning, ticket management, backlog visibility
- **Microsoft Teams:** Optional workspace for shared files, meetings, and communications
- **SharePoint or OneDrive:** Centralized repository for deliverables, meeting notes, and documentation
- **Status Dashboards:** Custom dashboard displaying progress, risks, milestones, and ownership, accessible to both WVBOM and Consultadd teams

Post-Go-Live Support Governance

Following go-live, governance will shift into a support phase where the WVBOM Project Sponsor and Consultadd's Project Manager will:

- Monitor support ticket volumes and SLA performance
- Meet monthly to review issue resolution trends
- Plan enhancement cycles or minor change requests collaboratively

This governance and communication structure gives WVBOM full transparency and decision control while ensuring our team remains responsive, proactive, and fully accountable throughout implementation and long-term support.

6. RISK MANAGEMENT

Large-scale modernization projects like this often face challenges during system transitions, especially when regulatory functions, licensing data, and end-user workflows are deeply embedded in legacy systems. Based on our experience with similar state licensing and regulatory bodies, we've proactively identified a set of high-impact risks and designed mitigation strategies that keep the project on track while safeguarding WVBOM's mission-critical operations.

Rather than viewing risk as a constraint, we treat it as a planning input, allowing us to build resilience into every phase of delivery, from data preparation to user adoption.

Observed Risks in Comparable Engagements and Our Mitigation Plan

Potential Risk Area	Risk Type	Mitigation Strategy
Data Migration from Oracle and Legacy Archives	Data integrity, incomplete mapping, file linkage loss	We begin migration planning during Discovery, mapping fields to new entities early. A two-phase migration process (test and final) with validation cycles ensures clean handover. We use standardized ETL tools and reconcile against original records to avoid data gaps.
User Adoption for Small Staff	Operational readiness, learning curve	With a lean internal team, training quality becomes critical. We deliver role-based, scenario-driven sessions with visual job aids and a live sandbox. Change management is embedded into training to build confidence gradually.
Accessibility Non-Compliance (WCAG 2.1 AA)	Legal exposure, service inequity	Accessibility is tested from the start using WAVE and Axe tools. Portals use Microsoft Power Pages, which are WCAG 2.1 AA-compliant by default. We provide final validation and fix recommendations before go-live.
Integration Complexity (E-Gov, FSMB)	API errors, data mismatches, delayed approvals	These are well-documented systems with stable endpoints. Our team has worked with FSMB before and follows a stub-first development model, allowing testing in parallel before real transactions begin.
Staff Availability During UAT	Limited feedback loop, missed test coverage	We keep UAT windows short and focused. Test plans are pre-scripted, with clear acceptance criteria. Staff can log comments in real time and revisit test records if availability is staggered.
Workflow or Form Misalignment Post-Go-Live	Interruptions in licensing operations	Admin users will be trained on editing workflows, form fields, and templates without coding. Minor misalignments can be corrected internally or through our SLA-backed support, avoiding delays or vendor bottlenecks.

Contingency Planning

Each implementation phase includes a buffer to accommodate minor schedule slips without affecting go-live. We also maintain a live risk register that is reviewed in weekly standups and escalated to the Steering Committee when needed. In high-impact areas (such as data migration or payment integration), we prepare fallback plans and freeze changes ahead of key cutover periods.

7. CHANGE MANAGEMENT AND USER ADOPTION STRATEGY

Technology upgrades succeed not only through technical execution but through thoughtful change management that prepares every user - internal and external - to succeed in the new environment. For WVBOM, where a small team manages a high-impact regulatory workload, the adoption of a new licensing platform must be seamless, well-supported, and aligned with day-to-day responsibilities from the start.

Our change management approach is grounded in real experience working with public-sector licensing agencies. We focus on building familiarity early, providing the right tools for transition, and ensuring that both staff and licensees are equipped to adapt without disruption.

Internal User Adoption and Transition Management

- **Role-Based Training**

Every staff member will be trained using real scenarios tied to their responsibilities (e.g., intake processing, complaint tracking, board material review). Live sessions will be supported by recorded walkthroughs, printable job aids, and cheat sheets for quick reference.

- **Sandbox Environment Access**

Users will have early access to a training environment with sample records. This lets them explore the system safely and become comfortable with dashboards, workflow triggers, and document upload processes.

- **Change Champions**

We will work with WVBOM to identify one or two internal “champions” who can serve as peer guides during the transition. These users will receive additional coaching and have direct contact with our support team during hypercare.

- **Go-Live Support and Hypercare**

During the first 60 days post go-live, our team will remain on standby to respond rapidly to configuration questions, workflow tweaks, and live support needs. This ensures the transition is steady, not disruptive.

Licensee and Applicant Education

- **Email Notifications and Countdown Messaging**

Prior to portal launch, we will draft and schedule automated emails to all active licensees. These messages will:

- Announce the new system
- Share key benefits
- Provide credentials or login instructions
- Offer video tutorials or help links

- **In-Portal Messaging**

On login, users will see banners or popups explaining new features or steps to complete renewal. This is especially helpful during the first application cycle in the new system.

- **Public-Facing FAQs and Help Library**

We will provide templated content for WVBOM's website or portal that explains how to use the system, download certificates, reset passwords, or upload documentation.

Self-Service Configuration for Admins

- **Admin Toolkit Overview**

WVBOM's designated administrative users will receive a no-code configuration dashboard. This allows them to:

- Modify workflows or approval paths
- Edit form fields or letter templates
- Adjust deadlines, notification messages, or user roles
- Create new application types or license categories over time

Training will include walkthroughs of these tools, with backup documentation and screen recordings for future reference. This gives WVBOM long-term control and flexibility without relying on external vendors for every small adjustment.

This strategy ensures that every user - whether an internal staff member or a first-time applicant - receives the information, tools, and confidence needed to make the transition successful. Our focus is not only on delivering a working system, but on enabling WVBOM to use and sustain it independently with full effectiveness.

Data Governance and Record Integrity

For a regulatory agency like WVBOM, the integrity, classification, and lifecycle of data are not just operational concerns - they are compliance imperatives. Every license record, complaint file, and disciplinary decision must be traceable, securely stored, and governed by clearly defined access and retention policies.

Our solution is built on Microsoft Dataverse and SharePoint Online (GCC), enabling strong governance controls over structured and unstructured data while giving WVBOM full control over how records are stored, secured, and accessed over time.

Record Classification and Versioning

- Each data entity in the system (e.g., license application, disciplinary case, complaint intake, board order) is tagged by type, status, and lifecycle stage.
- Documents attached to records (PDFs, transcripts, board decisions) are version-controlled automatically in SharePoint. This ensures staff can review past versions and restore prior states if needed.
- Metadata tagging supports advanced search, reporting, and archival management.

Retention and Disposition

- The platform enables WVBOM to configure retention rules based on record type, status, and disposition.
- For example, expired licenses may be archived after a set number of years while disciplinary records may be retained indefinitely based on legal requirements.
- Disposition workflows can be automated or admin-controlled, with approvals logged for traceability.

Role-Based Access to Active vs Archived Records

- Access to records is defined by user roles and organizational function. Licensing staff, board members, complaint handlers, and administrators can each be assigned distinct permissions.
- Archived records are available in read-only mode, with visibility restricted to approved internal users only.
- The audit log captures every access, view, or attempted modification, ensuring full traceability of historical records.

Audit Readiness and Legal Compliance

- The system maintains complete logs of user interactions, approvals, status changes, and document uploads.
- WVBOM can generate audit-ready reports showing:
 - Record status history
 - Staff or board interactions
 - Licensing or complaint workflows followed
 - Retention and access compliance
- All data is encrypted in transit and at rest, with audit trails stored securely within the Azure Government Cloud environment.

This approach to data governance gives WVBOM a licensing and disciplinary system that can evolve over time without sacrificing control, clarity, or compliance. Every record is accounted for, every access is logged, and every retention policy is enforced - ensuring the Board is prepared not only for daily operations, but for future audits, public record requests, and legal inquiries with confidence.

8. ACCESSIBILITY AND INCLUSION PLAN

Beyond compliance, WVBOM's public-facing licensing system must embody equity, clarity, and ease of use for every visitor - whether they are applying for the first time, renewing a license, or reviewing public records. Our solution reflects inclusive design principles at every level: from interface layout and language clarity to assistive tool compatibility and mobile responsiveness.

The platform is built using Microsoft Power Pages and Dynamics 365, both of which are designed to serve diverse users - including those with disabilities, limited English proficiency, or varying digital literacy.

Inclusive Design Practices

- Interfaces are designed with clear layouts, consistent structure, and minimal cognitive load.
- Navigation paths are linear and logical, ensuring users can complete tasks without confusion or excessive clicks.
- Design considerations account for vision, motor, auditory, and cognitive accessibility needs, reducing barriers for all users.

Plain Language for Public-Facing Content

- All portal content including form instructions, error messages, alerts, and system notifications - will use plain, jargon-free language.
- Dynamic guidance and contextual help will be embedded to support applicants as they move through multi-step forms or status updates.
- We support WVBOM in reviewing or rewriting standard messages to align with 6th–8th grade reading levels, consistent with U.S. government usability guidelines.

ADA and Assistive Tool Support

- The entire public and member portal experience conforms to ADA digital accessibility standards and WCAG 2.1 AA guidelines.
- Features include:
 - Screen reader support (tested with NVDA and JAWS)
 - Keyboard-only navigation for all interactions
 - Alt-text on images and icons
 - Focus indicators and logical tab sequencing
 - High-contrast mode compatibility
- Captions, transcripts, and downloadable content are available for videos, guides, and communications that support the application process.

This accessibility and inclusion plan ensures that WVBOM's digital system is not only legally compliant but genuinely usable by all. Whether a physician applying from a rural area or a caregiver seeking credential status on a mobile device, every user will experience a platform that is respectful, intuitive, and inclusive by design.

9. SUPPORT AND MAINTENANCE MODEL

FIVE-YEAR SUPPORT PLAN

Our support model is designed to sustain WVBOM's modern licensing platform well beyond initial deployment. Over the full five-year post-implementation period, we will provide SLA-backed helpdesk coverage, proactive system reviews, and responsive configuration support - all scaled to match the agency's usage patterns and staff availability.

Service Desk Structure

We operate a Tiered Support Desk model to ensure issues are resolved efficiently and routed to the right resource based on severity and complexity.

Tier	Support Function	Handled By
Tier 1	Basic helpdesk support, FAQs, password resets, end-user issues	Helpdesk Support Technician
Tier 2	Application configuration issues, minor bug fixes, workflow changes	Application Configuration Specialist
Tier 3	Complex issues involving integrations, performance, or system-wide impact	System Support Engineer & Escalation Team

Core Support Inclusions

- **Support Hours:** Monday to Friday, 8:00 AM – 6:00 PM Eastern (excluding state holidays)
- **Support Channels:** Email, phone, web-based ticket portal
- **Documentation:** Knowledge base, user manuals, video walkthroughs, and admin reference guides maintained and updated annually
- **Ongoing Configuration Support:** Includes adjustments to workflows, forms, notifications, portal text, and license templates

Annual Health Checks and Enhancement Planning

Each year, we will conduct a formal system health check and strategy session with WVBOM. This includes:

- Reviewing system usage and performance trends
- Identifying underutilized features or modules
- Capturing enhancement requests
- Updating system documentation
- Prioritizing roadmap items for the next 12-month cycle

System Monitoring and Error Tracking

We will enable real-time system monitoring using:

- Azure Monitor for environment uptime, latency, and load metrics
- Power Platform Admin Center for audit logging and environment usage
- Optional logs exported for internal review or compliance audits upon request

This structured support framework ensures WVBOM receives not just technical help but strategic partnership and ongoing adaptability across the full system lifecycle.

SLAS AND ESCALATION FRAMEWORK

To ensure accountability and confidence, we provide a clearly defined Service Level Agreement (SLA) and escalation model aligned with the urgency and business impact of different issue types.

SLA Severity Levels and Response Commitments

Priority	Definition	Initial Response Time	Target Resolution Time
Critical (P1)	System outage or widespread failure affecting licensee/staff access or data integrity	Within 1 hour	Within 4 business hours or workaround within 1 day
High (P2)	Major function impaired (e.g., application submission fails, data mismatch) but system still accessible	Within 4 hours	Within 1 business day
Medium (P3)	Routine issue with limited impact (e.g., formatting error, isolated access issue)	Same business day	Within 3 business days
Low (P4)	Non-urgent request, enhancement, or documentation query	Within 2 business days	Within 5–7 business days or added to backlog

All tickets are logged and tracked through our ticketing system with status updates shared at each stage. WVBOM will have full visibility into resolution timelines and request histories.

Escalation Contacts and Governance Review

If an issue is not progressing satisfactorily or impacts a major deliverable, WVBOM staff can escalate the ticket through the following structured path:

1. **Tier 1 Resolution Fails → Escalation to Tier 2**
2. **No Resolution Within SLA → Escalation to Project Manager**
3. **Repeated Issues or Pattern Detected → Added to Monthly Governance Review for Root Cause Analysis and Retrospective**

The **Project Manager** remains WVBOM's single point of contact throughout implementation and post-go-live support. In quarterly reviews, we will present SLA performance metrics, ticket trends, and jointly agree on improvements.

This SLA and escalation framework is built to protect WVBOM's operations while reinforcing the transparency, responsiveness, and trust expected in long-term public-sector partnerships.

10. TEAM AND STAFFING PLAN

Our team structure is designed to ensure end-to-end ownership, with dedicated specialists for each phase of implementation and support. The project will be delivered by a focused 8-member core team during implementation, followed by a lean 3-member support team post-deployment. Each team member has been selected for their direct experience with Microsoft Dynamics 365, public-sector licensing systems, and cloud-first modernization initiatives.

PROJECT STRUCTURE OVERVIEW

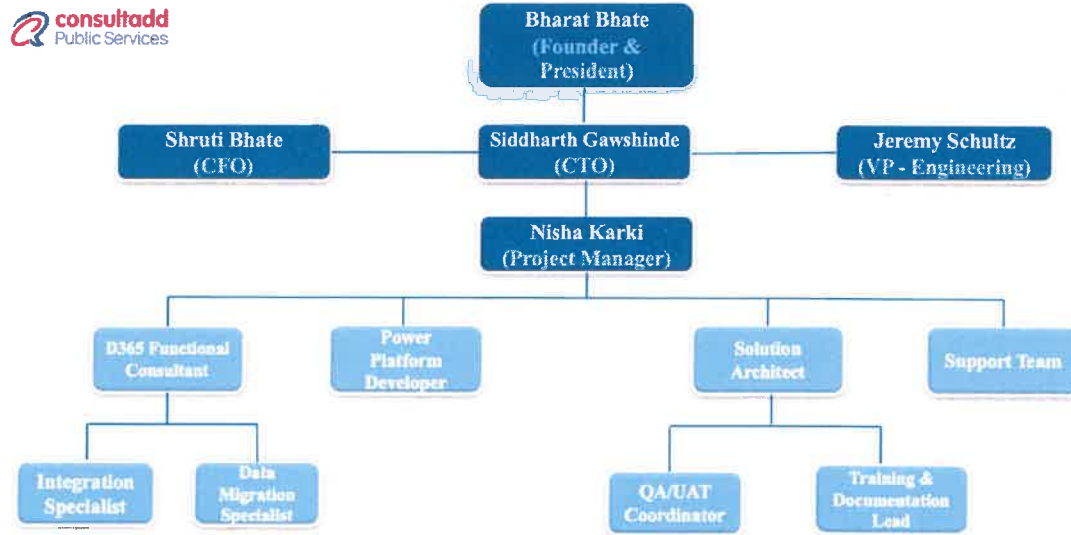
Role	Responsibilities
Project Manager	Oversees entire project lifecycle, manages schedule, risk, and stakeholder coordination. Single point of contact for WVBOM.
Solution Architect	Leads system design, security model, integration strategy, and alignment with WVBOM's data structure and compliance goals.
Dynamics 365 Functional Consultant	Configures license types, complaint flows, forms, templates, dashboards, and user roles.
Power Platform Developer	Builds Power Pages portal, custom forms, workflow automation, PDF generation, and portal theming.
Integration Specialist	Connects system to FSMB, E-Gov, and Azure AD B2C using secure API frameworks. Manages authentication flow and external connectivity.
Data Migration Specialist	Handles extraction, transformation, validation, and loading of licensee and complaint data from Oracle and legacy systems.
QA and UAT Coordinator	Develops test plans, manages UAT, oversees defect resolution, and ensures stakeholder sign-off before each go/no-go decision.
Training and Documentation Lead	Develops manuals, training content, and leads onboarding sessions for staff, board members, and applicants.

Note: No subcontractors will be used on this engagement. All team members are full-time Consultadd personnel with direct accountability and availability throughout the implementation and support period.

POST-DEPLOYMENT SUPPORT TEAM

Role	Responsibilities
Helpdesk Support Technician (L1)	Provides Tier 1 assistance for WVBOM staff and applicants, manages user-facing requests, and handles routine troubleshooting.
Application Configuration Specialist (L2)	Handles role-based access, workflow adjustments, notification templates, and other no-code platform configurations.
System Support Engineer (L3)	Responds to complex technical issues post-launch, monitors system health, and supports defect remediation.

These roles activate fully during the post-go-live hypercare phase and continue through the 5-year SLA period.

ORGANIZATIONAL CHART:**STAFF QUALIFICATIONS**

Our personnel bring direct, hands-on experience delivering Microsoft-based solutions for public-sector licensing, credentialing, and complaint tracking systems. Their qualifications include a blend of platform certifications, domain expertise, and successful delivery of similar government projects.

Role-Based Qualifications

Role	Relevant Experience	Certifications
Project Manager	13+ years managing public-sector IT projects including licensing agencies	PMP® and Certified Scrum Master (CSM)
Solution Architect	9+ years designing Microsoft cloud and Power Platform solutions	Microsoft Certified: Power Platform Solution Architect Expert
D365 Functional Consultant	8+ years configuring licensing systems, workflows, Dataverse, and Power Apps	Microsoft Certified: Power Platform Functional Consultant Associate
Power Platform Developer	7+ years developing Power Apps, Power Automate, and Power Pages	Microsoft Certified: Power Platform Developer Associate
Integration Specialist	8+ years in secure API development using Azure services and JSON REST APIs	Microsoft Certified: Azure Developer Associate (or Azure Fundamentals as secondary)
Data Migration Specialist	8+ years in ETL pipelines and legacy system transformations	Microsoft Certified: Data Analyst Associate or Azure Data Fundamentals

QA and UAT Coordinator	6+ years in QA, test planning, public-sector UAT cycles	ISTQB Certified Tester – Foundation Level
Training & Documentation Lead	7+ years in instructional design and role-based training delivery	CompTIA CTT+ (Certified Technical Trainer)

This team structure ensures WVBOM receives focused delivery from experienced specialists who understand public-sector expectations, Microsoft technologies, and the operational demands of regulatory agencies. All personnel are U.S.-based, committed to the full project duration, and available for remote or on-site collaboration as needed.



11. QUALIFICATIONS AND EXPERIENCE

PRIOR LICENSING SYSTEM IMPLEMENTATION

Consultadd Public Services has successfully implemented a licensing and regulatory management system for a U.S. state licensing board within the past three years, aligning directly with WVBOM's scope and expectations.

Agency Name	Scope of Work	Timeline	Outcomes Achieved
[Redacted State Licensing Board]*	Delivered Microsoft Dynamics 365-based system for license applications, renewals, disciplinary case tracking, and integrated board reporting. Migrated 15+ years of records from Oracle and file shares.	12 months	Full transition from legacy system to web-based portal. Improved turnaround time by 43%, eliminated paper-based renewals, enabled role-based board document access, and integrated FSMB data exchange.

Note: Due to client confidentiality, we have redacted the agency name. However, full contact details, documentation, and reference letters are available to the evaluation committee upon request under NDA.

Consultadd led all phases from requirements to go-live, supported FSMB integration, and ensured WCAG/HIPAA compliance.

ONGOING SUPPORT (5+ YEARS)

We currently provide ongoing maintenance and support for the above-mentioned licensing system under a multi-year SLA. Support services include:

- SLA-backed Tier 1–3 helpdesk support
- Workflow and form configuration changes
- Periodic training refreshers
- Version upgrades and compliance reviews
- Annual enhancement planning

We are the primary support vendor of record and have maintained a continuous support relationship for over 5 years. We can provide a client reference and support structure documentation upon request from the evaluation committee.

AUTHORIZATION TO LICENSE/RESELL

Consultadd is a Microsoft Approved Partner authorized to resell and support Microsoft licensing products and services under the Microsoft Cloud Solution Provider (CSP) program. Consultadd is not only authorized to resell and support the Microsoft solutions proposed, we are also fully authorized to transfer intellectual property and provide technical support, hosting, and long-term

management of these platforms. We maintain active CSP credentials and can provide documentation verifying this authorization upon request. We have valid partner credentials for:

- Microsoft Dynamics 365 (GCC and Commercial)
- Power Platform (Power Pages, Power Apps, Power Automate)
- Azure Government and Microsoft 365 GCC

We can provide documentation verifying our authorization to license and support all proposed software components upon request.

12. RELEVANT EXPERIENCE AND CASE STUDIES

WVBOM's initiative to modernize its licensing and regulatory system requires not only technical execution, but real-world familiarity with the nuances of public-sector workflows, data sensitivity, accessibility mandates, and long-term support expectations. Over the past several years, Consultadd Public Services has led and supported multiple engagements that reflect these same challenges - across public agencies, federal programs, and regulated private-sector environments.

The case studies in the following tables highlight our experience with:

- Licensing lifecycle modernization
- Data migration from legacy systems
- Self-service portal delivery
- Integration with payment gateways, third-party systems, and identity providers
- Configurable workflow automation
- Accessibility (WCAG 2.1 AA), HIPAA, and audit-readiness

While each agency, jurisdiction, or organization faced a different starting point, our role in these projects has remained consistent: to deliver practical, secure, and scalable systems that reduce manual burden, improve transparency, and empower teams with modern tools that grow with their mission.

The agencies and organizations featured below are diverse in geography and scope from state licensing boards and county governments to major health science and research institutions but they all sought what WVBOM is now pursuing: a solution that is easy to use, flexible to evolve, and resilient for the future.

Public Sector Case Studies



State of South Carolina - STC Dynamics MSP

Project Scope:

Long-term managed support and workflow configuration for a state licensing and permitting system built on Microsoft Dynamics 365.

Solution Provided

Configured licensing modules, migrated records, enabled role-based dashboards, and provided SLA-backed support.

Project Impact

Sustained performance across 3+ years, reduced manual renewals by 60%, and cut response times for licensee queries by 48%.



Macomb County, Michigan

Project Scope:

Migration from legacy on-prem environment to Microsoft 365 cloud to enable secure document handling, identity management, and staff workflows.

Solution Provided

Implemented Microsoft 365 with Azure AD and SharePoint for secure record access, staff collaboration, and licensing task management.

Project Impact

Improved system uptime to 99.95%, enhanced staff access control, and laid foundation for regulatory data tracking.



Sunnyvale

City of Sunnyvale, California

Project Scope:

Development of application/workflow automation and portal integration for licensing and internal review processes.

Solution Provided

Built Power Platform solution to manage form submissions, automate licensing workflows, and integrate data with backend services.

Project Impact

Reduced approval cycle times by 30%, improved interdepartmental coordination, and delivered an accessible public interface.



Monroe County, New York

Project Scope:

ERP support and licensing module configuration for regulatory and compliance-related business units.

Solution Provided

Delivered role-based access, report automation, and record lifecycle enhancements within existing ERP environment

Project Impact

Improved licensing workflow tracking and automated renewal alerts, reducing staff hours spent on follow-ups by 35%



Dept. of Natural Resources, Ohio

Project Scope:

Enhancing task tracking and licensing workflow capabilities within a Salesforce-based system.

Solution Provided

Developed a low-code enhancement layer over existing Salesforce platform, focused on automated license assignment and disciplinary status updates.

Project Impact

Improved visibility into licensee task statuses, supported WCAG 2.1 AA compliance, and created a reusable workflow template library.

Private Sector Case Studies



Optum

Project Scope:

Support for enterprise health data licensing and role-based access control system across internal regulatory and research users.

Solution Provided

Developed configurable workflow for internal license approvals, audit trails, and secure API-based data provisioning.

Project Impact

Enabled centralized license issuance across 8 business units, improved audit transparency, and ensured HIPAA alignment.



Trimble

Project Scope:

Software entitlement and license automation for users accessing commercial geospatial software.

Solution Provided

Integrated identity-based access licensing platform with role tiers, usage tracking, and entitlement workflows.

Project Impact

Improved license provisioning speed by 70%, reduced support tickets by 40%, and enhanced compliance tracking.



Corteva
Agriscience

Project Scope:

Streamlined trait licensing workflows for seed distribution and R&D partners across multiple countries.

Solution Provided

Automated approval workflows, e-signature management, and licensing dashboard via Power Platform and Microsoft 365.

Project Impact

Accelerated license agreement turnaround by 42%, enabled document traceability, and provided real-time licensing analytics.

Federal Sector Case Studies



**U.S. Department of
Agriculture (USDA)**

Project Scope:

Modernization of permitting and licensing infrastructure for agricultural compliance programs under APHIS.

Solution Provided

Supported migration to cloud-based forms, configurable license logic, and public access portals with record status tracking.

Project Impact

Reduced permit issuance time by 38%, enabled mobile access for inspectors, and created a centralized record repository.



**Small Business
Administration
(SBA)**

Project Scope:

Workflow automation for business registration/licensing intake and agency-side status tracking.

Solution Provided

Developed licensing intake form portal, internal dashboard for license reviewers, and applicant messaging framework.

Project Impact

Improved tracking transparency for thousands of small business applicants and reduced intake processing bottlenecks by 25%.

References

Consultadd Public Services has successfully delivered similar licensing, credentialing, and digital modernization solutions for a range of government and healthcare organizations across the United States. The following references have been selected to reflect relevant scope, scale, and technical alignment with the West Virginia Board of Medicine project. These engagements highlight our experience in deploying Microsoft-based systems for licensure management, case tracking, external user portals, and cloud infrastructure. Full reference contact information and authorization is available upon request.

Client Organization	Project Description	Project Duration	Reference Contact (Name / Title)	Contact Email / Phone
USDA – United States Department of Agriculture	Implementation of a Dynamics 365-based licensure & credentialing solution for federal rural professionals, including portal access, workflows, and	Jan 2020 – Dec 2021	Richa Mistry Project Manager	Richa.mistry@usda.gov (218)-297-8107

MEDICAL LICENSURE / RECORDS DATABASE MAINTENANCE SYSTE

	compliance audit logging.			
Optum	Deployment of a Power Platform-driven case management system for healthcare provider credentials, document repository, and automated renewal processes, supporting ~50,000 credential holders.	Mar 2019 – Jun 2020	Rajeev Ranjan Sr. Delivery Lead	rajeev.ranjan161@optum.com (254) 252-3040
National Association of County and City Health Officials (NACCHO)	Deployment of a Microsoft Dynamics 365 Customer Service and Power Platform solution for state/local public-health credentialing and board tracking, including external user portal for 45,000 licensees, automated renewal workflows, document management (PDFs, images), and full audit-trail functionality for compliance with federal reporting standards.	Aug 2018 – May 2019	Ankur Patania IT Coordinator	ankurpathania86@gmail.com (914)-863-6511

13. SCALABILITY AND FUTURE-READINESS

WVBOM's current licensing infrastructure has served the agency well, but it presents clear operational constraints. Manual renewals, fragmented complaint tracking, data scattered across legacy systems, and limited integration pathways have made it harder to scale, adapt, or serve applicants with the speed today's environment demands.

Our solution directly addresses these challenges - not only solving for today, but laying a foundation for tomorrow.

Challenges Addressed by the Proposed Solution

- Fragmented Systems → Unified Platform**
 All licensing, renewal, complaint, document, and reporting functions are consolidated into a single Microsoft-based platform, eliminating siloed processes and duplicated data entry.
- Manual Workflows → Configurable Automation**
 Tasks like application routing, board packet generation, and complaint intake are streamlined through rule-based automation that WVBOM can update anytime.
- Limited Public Access → Self-Service Portals**
 Applicants and licensees gain secure access to submit forms, track status, and download credentials — reducing phone calls and staff workload.
- Rigid Systems → Cloud-Native Flexibility**
 Instead of custom-built solutions that require developer intervention, WVBOM gains a configurable platform that scales with licensing volumes, staff needs, and new credential types.

FUTURE-READY DESIGN FOR LONG-TERM IMPACT

Area	Future Need	Our Solution
Licensing Expansion	New license types or compact programs	Templates and workflows can be cloned, adjusted, and published without code
Policy Changes	Adjusting renewal terms, board workflows	Admin users can update business logic through visual tools
Data Growth	Increased record volume, attachments	Azure-hosted environment expands seamlessly with demand
Public Expectations	On-demand access, transparency	Mobile-ready portal, digital credential downloads, and real-time messaging

This solution positions WVBOM not just to catch up with peer boards, but to lead. By resolving today's operational pain points and providing tools that adapt to future needs, we help ensure the Board remains efficient, transparent, and responsive in a changing healthcare environment.

14. DATA MIGRATION STRATEGY

WVBOM's ability to securely and accurately migrate data from its legacy Oracle-based system into the new licensing platform is critical to the success of this project. Based on our experience with similar migrations for state boards and government agencies, Consultadd proposes a proven, low-risk, and auditable migration approach.

Our strategy ensures that all licensee, disciplinary, complaint, board, and historical records are fully preserved, reconciled, and accessible in the new system.

Overview of Migration Approach

Phase	Activities
1. Discovery & Mapping	<ul style="list-style-type: none"> - Analyze legacy Oracle database structure and schemas - Collaborate with WVBOM stakeholders to identify target data tables and fields - Define mapping rules to Dataverse entities in Dynamics 365
2. Data Extraction & Staging	<ul style="list-style-type: none"> - Extract data from Oracle into staging tables using ETL tools - Cleanse and normalize data formats (dates, status values, relationships) - De-duplicate records if needed
3. Test Migration (Trial Run)	<ul style="list-style-type: none"> - Import a full set of test data into a sandbox environment - Validate record integrity, document links, relationships, and lookup fields - Share validation checklist with WVBOM SMEs for review and sign-off
4. Final Migration & Cutover	<ul style="list-style-type: none"> - Perform final data export from Oracle - Import validated dataset into production environment - Freeze legacy changes at cut-off point - Conduct spot checks and reconciliation reports
5. Post-Migration Validation	<ul style="list-style-type: none"> - Run post-import audit scripts and reports - Provide side-by-side reconciliation reports comparing legacy vs. new system - Document migration outcomes for compliance or future audits

What Types of Records Will Be Migrated

- Active and inactive licensee records (MD, DO, PA, DPM, etc.)
- Complaint and disciplinary case histories
- Board meeting and decision records
- Supporting document links or references
- Status flags, expiration dates, license numbers
- Archived licensee data (~20,000+ records as per RFP Exhibit 1)

Tools and Technology Used

- Azure Data Factory (ADF) for staging and transformation
- Power Query and Dataverse import templates
- Oracle ODBC connector or custom extraction script (if needed)
- Microsoft Power BI for pre/post migration reporting and validation dashboards

Security and Chain of Custody

- All data is processed in a secure staging environment within Azure
- Temporary files and logs are encrypted at rest and deleted post-project
- Role-based access is enforced throughout the migration pipeline
- Audit trail of who accessed or manipulated data is maintained

15. OPTIONAL WEB AND DOMAIN SERVICES

In response to §4.3.1.4 of the RFP, Consultadd Public Services confirms that we offer additional digital services related to website management, secure hosting, and domain support. These offerings are not required for the successful delivery of the licensing system described in this proposal but are available if WVBOM wishes to consolidate its digital infrastructure or enhance its online presence.

Consultadd confirms it can optionally provide full website hosting, visual redesign, and ongoing domain integration services as requested in §4.2.1.9. Our team has experience designing accessible, secure, and mobile-ready public-sector websites and can consolidate WVBOM's licensing portal and informational site into a single WCAG 2.1 AA-compliant environment. These services can be initiated in parallel or subsequent to the licensing system deployment, as desired by the Board.

These optional services can be provided in parallel with the licensing project or at a future phase, based on the Board's priorities and internal roadmap.

Available Optional Services

Service	What We Offer	When It's Helpful
Website Design and Refresh	Visual redesign or rebuild of WVBOM's public website using accessible, CMS-based tools (e.g., WordPress, Power Pages)	When modernizing the public-facing site alongside the licensing portal
WCAG 2.1 AA Accessibility Support	Testing and remediation to ensure compliance with digital accessibility laws	If current website content does not meet accessibility expectations
Domain Consolidation & DNS Management	Management of domain name registration, DNS forwarding, subdomain setup, and SSL provisioning	If WVBOM wants a single domain for public website, portal, and admin login
Static and Dynamic Content Hosting	Secure hosting for site files, forms, and non-system resources in Azure or AWS	When WVBOM prefers to offload non-licensing site content to a managed cloud environment
Public Communications Support	Optional content guidance or layout support for pages related to licensing FAQs, board notices, or disciplinary updates	To reduce phone/email volume and improve applicant self-service

Security and Infrastructure Standards

All optional hosting and domain services are delivered under the same security posture as our core implementation:

- Hosted in U.S.-based cloud environments (Azure Gov or AWS GovCloud)
- SSL/TLS encryption and HTTPS-enabled traffic
- Optional domain-specific email setup or redirection
- Monthly uptime and traffic reports available if WVBOM opts in

How These Services Support WVBOM

- Simplifies public communication and visibility of licensing processes
- Supports a consistent, secure, and accessible experience across all agency web properties
- Reduces reliance on third-party hosting vendors
- Ensures WVBOM has full control over its digital assets and public messaging

These services are not included in the proposed project cost but are available on request as a separate engagement. We are happy to provide more detail, demonstrations, or pricing scenarios if WVBOM indicates interest during or after project initiation.

16. VALUE – ADDED SERVICES

WVBOM's modernization effort is an important step toward strengthening public trust, streamlining staff operations, and elevating the quality of digital services available to applicants and licensees. To support this transition and reinforce our commitment to the Board's long-term success, we provide a set of value-added services at no additional cost. These offerings extend beyond the defined scope and are designed to enhance transparency, improve adoption, and help WVBOM gain deeper insight into system performance and user engagement.

Our intention is to ensure the Board receives not only a new system, but a sustained partnership experience that continues to deliver value throughout the implementation and support period.

VALUE-ADDED DASHBOARDS AND ANALYTICS

WVBOM will have access to a series of dashboards that offer ongoing visibility into system usage and operational performance. These dashboards are created using Power BI and require no effort from WVBOM to maintain.

Included Dashboards

- **Monthly Project Progress Dashboard**
Visual insight into completed tasks, upcoming milestones, open issues, and project health indicators.
- **License Processing Efficiency Dashboard**
Shows application turnaround times, renewal volumes, average processing duration, and bottleneck detection.
- **Support Ticket Trend Dashboard**
Tracks ticket categories, resolution time, percentage reduction of recurring issues, and areas requiring user retraining or configuration improvements.
- **Portal Engagement Dashboard**
Displays applicant login trends, form completion behavior, document upload issues, and common user paths.
- **Complaint and Case Activity Dashboard**
Summaries of open cases, average time to resolution, and workload distribution.

These dashboards help WVBOM leadership and staff maintain clear operational awareness without manually compiling reports.

QUARTERLY BUSINESS REVIEWS (QBRs)

To maintain alignment and continuous improvement, our team will hold structured Quarterly Business Review sessions at no additional charge. These sessions include:

- Review of system performance and SLA metrics
- Identification of emerging needs or opportunities for workflow improvements
- Review of support trends and potential process improvements
- Discussion of upcoming regulatory or operational changes
- Roadmap planning for enhancements or configuration adjustments

QBRs ensure the Board receives consistent guidance and maintains long-term strategic insight into the system.

INTERNAL CHAMPION DEVELOPMENT PROGRAM

To reduce dependency on external support and empower WVBOM's small staff, we will:

- Identify one or two “system champions” from WVBOM
- Provide them with additional coaching, admin tips, workflow building guidance, and deeper access to configuration tools
- Give them an exclusive troubleshooting mini-guide for common internal tasks

This helps WVBOM build internal capacity without adding staffing overhead.

ENHANCED TRAINING SUPPORT

Beyond formal training, we provide:

- Microlearning videos for repeatable tasks such as updating license templates or modifying workflows
- Printable quick-reference sheets for staff and board members
- Refresher training sessions within the first 6 months post-go-live
- Checklist guides for renewal season or busy application periods

This strengthens comfort and confidence among users, especially during high-volume cycles.

PROACTIVE ADVISORY AND GOVERNANCE SUPPORT

To help WVBOM stay ahead of operational or regulatory shifts, we also offer:

- Monthly governance alignment calls with the Project Manager
- Proactive recommendations on workflow tuning, security improvements, or portal enhancements
- Best-practice advisory notes based on our experience with other public-sector licensing agencies

This positions WVBOM to continually optimize the system without extra cost.

CONTINUOUS VALUE MONITORING

Throughout the engagement, we will:

- Track usage data to identify friction points
- Recommend low-effort configuration enhancements
- Monitor applicant behavior patterns to reduce support tickets
- Share insights during QBRs to help WVBOM optimize processes over time

This ensures the system grows with WVBOM rather than becoming static.

In Summary

All value-added services listed above are provided as part of our engagement at no additional cost. They are designed to help WVBOM maximize the benefit of its new licensing platform, reduce operational burden, and continuously enhance service delivery without increasing internal overhead.

17. ASSUMPTIONS

To ensure alignment between WVBOM's expectations and the scope of services defined in this proposal, the following assumptions have been made regarding implementation, platform capabilities, infrastructure requirements, and usage patterns. These assumptions are based on our experience supporting public-sector licensing boards, our detailed analysis of the RFP and its attachments, and industry-standard practices for similar cloud-based database modernization efforts.

By clearly stating these assumptions, we aim to establish a shared understanding of the proposed system's design boundaries and delivery model. Should any of these assumptions materially change during discovery or implementation, we will work collaboratively with WVBOM to evaluate impacts and adjust the project plan or pricing accordingly.

Modular Implementation

The proposed solution is based on Microsoft Dynamics 365 Customer Service (GCC) integrated with Power Platform tools (Power Pages, Power Automate, Power BI) and hosted in Azure Government Cloud. The system is modular and web-based, requiring no local infrastructure at WVBOM.

Configurable, Not Custom-Coded

All workflows, forms, and logic will be implemented using no-code and low-code configuration within the Power Platform. No deep code-level custom development (JavaScript, C# plugins, etc.) is assumed unless later required by WVBOM.

Data Migration Scope

The migration assumes approximately 20,000+ active and archived licensee records, complaint files, disciplinary actions, and associated documents based on RFP Exhibit 1. No corrupted or unstructured legacy data is assumed unless explicitly identified during discovery.

Licensing User Count

The solution is sized for 15 D365 named users, 5,400 monthly active authenticated portal users, and 30,000 anonymous public license lookups/month - based on agency staffing structure and typical medical board user behavior.

Azure Hosting Requirements

We have provisioned hosting infrastructure for:

- 1x App Service (S1)
- 1x SQL DB (S3/P2)
- 300 GB Azure Blob storage (Hot Tier)
- 200 GB/month outbound data
- 100 GB backup vault (30-day retention)

Dataverse Storage

We assume the included Dataverse storage (13.75 GB) from base licensing is sufficient at go-live. Additional storage, if later needed, will be handled via change order.

Third-Party Systems

No third-party integrations are assumed beyond Microsoft ecosystem tools. Any interfaces with eGov, legacy reporting systems, or identity providers will be evaluated post-award.

Language, Accessibility & Security

All public-facing components are assumed to be in English, Section 508 compliant, and WCAG 2.1 AA aligned by default using native Microsoft Power Pages capabilities.

User Device Readiness

It is assumed WVBOM staff will access the system using modern, browser-enabled workstations. No support for legacy operating systems or browsers (e.g., Internet Explorer) is included.

Training and Admin Access

WVBOM administrators will receive training on no-code tools for workflow editing, form updates, and letter templates. This empowers staff to independently manage business logic after go-live without developer involvement.

18. COMMITMENT TO WVBOM

The West Virginia Board of Medicine plays a vital role in protecting the health and safety of the public, and we recognize the responsibility and trust placed in your licensing and regulatory processes. Your mission to uphold high standards of professional practice guides every interaction your agency has with applicants, licensees, and the community, and it is the foundation on which our solution has been designed.

Our team is committed to supporting that mission by delivering a system that strengthens transparency, reduces administrative burden, and improves accessibility for all stakeholders. From data migration to configuration, training, and long-term support, we will work closely with your staff to ensure the platform reflects the professionalism and integrity for which WVBOM is known.

As your partner, we will remain attentive, flexible, and proactive, helping you modernize core operations while preserving the values that define your service to the people of West Virginia. We appreciate the opportunity to collaborate with the Board and stand ready to bring forward a solution that supports your mission today and prepares you for the needs of tomorrow.

19. CERTIFICATION AND SIGNATURE FORM

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) Bharat Bhate, Founder & President

(Address) 175 Greenwich St, 38th Floor, New York, NY, 10007

(Phone Number) / (Fax Number) 888-771-9958

(email address) publicservices@consultadd.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.

Consultadd Inc.

(Company) 

(Signature of Authorized Representative)

Bharat Bhate, Founder & President

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

888-771-9958

(Phone Number) (Fax Number)

publicservices@consultadd.com

(Email Address)

20. ADDENDUM ACKNOWLEDGMENT



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

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1739608

Doc Description: Medical Licensure / Records Database Maintenance System

Reason for Modification:

To post Addendum 01.

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-08-06	2025-09-19 13:30	CRFP 0945 BOM2600000001	2

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000047408

Vendor Name : Consultadd Inc.

Address : 175 Greenwich St, 38th Floor

Street :

City : New York

State : New York

Country : USA

Zip : 10007

Principal Contact : Bharat Bhate

Vendor Contact Phone: 888-771-9958

Extension:

FOR INFORMATION CONTACT THE BUYER

Larry D McDonnell
304-558-2063
larry.d.mcdonnell@wv.gov

**Vendor
Signature X**

FEIN# 274565433

DATE 11/17/2025

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

ADDITIONAL INFORMATION

Addendum 01.

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 08/19/2025 to 09/19/2025.

The bid opening time still remains at 1:30PM EST/EDT

No other changes

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US	HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	DATABASE SYSTEM AND MAINTENANCE				

Comm Code	Manufacturer	Specification	Model #
81111507			

Extended Description:

See attached documentation for further details.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Vendor Questions due by 2:00PM EST/EDT	2025-08-05

SOLICITATION NUMBER: CRFP BOM26*01

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:

- ☒ [X] 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:

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 08/19/2025 to 09/19/2025.

The bid opening time still remains at 1:30PM EST/EDT

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.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP BOM26*01

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

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

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

Consultadd Inc.

Company

Authorized Signature

11/17/2025

Date

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



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

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1739608

Doc Description: Medical Licensure / Records Database Maintenance System

Reason for Modification:

To post Addendum 02

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-09-16	2025-11-12 13:30	CRFP 0945 BOM2600000001	3

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000047408

Vendor Name : Consultadd Inc.

Address : 175 Greenwich St, 38th Floor

Street :

City : New York

State : New York

Country : USA

Zip : 10007

Principal Contact : Bharat Bhate

Vendor Contact Phone: 888-771-9958

Extension:

FOR INFORMATION CONTACT THE BUYER

Larry D McDonnell
304-558-2063
larry.d.mcdonnell@wv.gov

Vendor
Signature X

FEIN# 274565433

DATE 11/17/2025

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

ADDITIONAL INFORMATION

Addendum 02.

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 09/19/2025 to 11/12/2025.

The bid opening time still remains at 1:30PM EST/EDT

No other changes

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US	HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	DATABASE SYSTEM AND MAINTENANCE				

Comm Code	Manufacturer	Specification	Model #
81111507			

Extended Description:

See attached documentation for further details.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Vendor Questions due by 2:00PM EST/EDT	2025-08-05

SOLICITATION NUMBER: CRFP BOM26*01

Addendum Number: 2

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:

- ☒ [X] 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:

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 09/19/2025 to 11/12/2025.

The bid opening time still remains at 1:30PM EST/EDT

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.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP BOM26*01

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

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

Consultadd Inc.

Company



Authorized Signature

11/17/2025

Date

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



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

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1739608

Doc Description: Medical Licensure / Records Database Maintenance System

Reason for Modification:

Addendum No. 03

Proc Type: Central Master Agreement

Date Issued

Solicitation Closes

Solicitation No

Version

2025-11-05

2025-11-19 13:30

CRFP 0945 BOM2600000001

4

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON WV 25305

US

VENDOR

Vendor Customer Code: VS0000047408

Vendor Name : Consultadd Inc.

Address : 175 Greenwich St, 38th Floor

Street :

City : New York

State : New York

Country : USA

Zip : 10007

Principal Contact : Bharat Bhate

Vendor Contact Phone: 888-771-9958

Extension:

FOR INFORMATION CONTACT THE BUYER

Larry D McDonnell

304-558-2063

larry.d.mcdonnell@wv.gov

**Vendor
Signature X**

FEIN# 274565433

DATE 11/17/2025

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

ADDITIONAL INFORMATION

Addendum 03.

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 11/12/2025 to 11/19/2025.

The bid opening time still remains at 1:30PM EST/EDT

No other changes

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US	HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	DATABASE SYSTEM AND MAINTENANCE				

Comm Code	Manufacturer	Specification	Model #
81111507			

Extended Description:

See attached documentation for further details.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Vendor Questions due by 2:00PM EST/EDT	2025-08-05

SOLICITATION NUMBER: CRFP BOM26*01
Addendum Number: 3

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:

- ☒ [X] 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:

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 11/12/2025 to 11/19/2025.

The bid opening time still remains at 1:30PM EST/EDT

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.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP BOM26*01

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

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

Consultadd Inc.

Company



Authorized Signature

11/17/2025

Date

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



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

State of West Virginia
Centralized Request for Proposals
Info Technology

Proc Folder: 1739608

Doc Description: Medical Licensure / Records Database Maintenance System

Reason for Modification:

Addendum No. 04

Proc Type: Central Master Agreement

Date Issued	Solicitation Closes	Solicitation No	Version
2025-11-17	2025-12-03 13:30	CRFP 0945 BOM2600000001	5

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000047408

Vendor Name : Consultadd Inc.

Address : 175 Greenwich St, 38th Floor

Street :

City : New York

State : New York

Country : USA

Zip : 10007

Principal Contact : Bharat Bhate

Vendor Contact Phone: 888-771-9958

Extension:

FOR INFORMATION CONTACT THE BUYER

Larry D McDonnell
304-558-2063
larry.d.mcdonnell@wv.gov

**Vendor
Signature X**

FEIN# 274565433

DATE 11/24/2025

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

ADDITIONAL INFORMATION

Addendum 04.

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 11/19/2025 to 12/03/2025.

The bid opening time still remains at 1:30PM EST/EDT

No other changes

INVOICE TO	SHIP TO
HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US	HEALTH AND HUMAN RESOURCES BOARD OF MEDICINE 101 DEE DRIVE CHARLESTON WV 25311 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	DATABASE SYSTEM AND MAINTENANCE				

Comm Code	Manufacturer	Specification	Model #
81111507			

Extended Description:

See attached documentation for further details.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Vendor Questions due by 2:00PM EST/EDT	2025-08-05

SOLICITATION NUMBER: CRFP BOM26*01

Addendum Number: 4

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:

Response to vendor questions will be issued under separate addendum.

Bid opening date has been extended from 11/19/2025 to 12/03/2025.

The bid opening time still remains at 1:30PM EST/EDT

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.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFP BOM26*01

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 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 checked="" type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

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Consultadd Inc.

Company

Authorized Signature

11/24/2025

Date

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