27 Congress Street, Suite 1310
Salem, MA 01970
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November 25, 2025

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

Dear Mr. Larry McDonnell,

Thank you for your quick response regarding our question concerning the Addendum Acknowledgement for CRFP BOM26*01. As instructed, we are sending an addiitonal Addendum Acknowledgement that includes Addendums 4 and 5. **Please add this Addendum Acknowledgement to the bid response that we already submitted.**

For reference, JD Software submitted our proposal for CRFP BOM26*01 by mail in order to meet its November 19 deadline. While the proposal was in transit, the Purchasing Division issued Addendum 4 extending the deadline and we recently received Addendum 5 containing the State's responses to questions.

We reviewed the responses in Addendum 5 and confirmed that they do not affect our proposal. Because our submission was prepared prior to the release of Addendums 4 and 5, we are submitting an additional Addendum Acknowledgement to ensure our submission is compliant.

Thank you for your consideration of our proposal and we look forward to the possibility of working together.

Sincerely,

Matthew Poussard

Matthew Poussard
Director of Software Development | JD Software
Phone: 978-224-1497
Email : mpoussard@jdsoft.com

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)

[X] Addendum No. 1	[ ] Addendum No. 6
[X] Addendum No. 2	[ ] Addendum No. 7
[X] Addendum No. 3	[ ] Addendum No. 8
[X] Addendum No. 4	[ ] Addendum No. 9
[X] Addendum No. 5	[ ] 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.

Company: JD Software

Authorized Signature: Matthew Poussard

By: Matthew Poussard
Director of Software Development

Date: 11/25/2025

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

West Virginia Board of Medicine

Technical Response to Medical Licensure / Records Database Maintenance System

RFP Number: CRFP 0945 BOM2600000001

November 13, 2025

JD Software

Matthew Poussard | Director of Software Development
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November 10, 2025

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

Dear Mr. Larry McDonnell,

JD Software is pleased to submit this proposal in response to the Request for Proposal issued by the West Virginia Board of Medicine (WVBOM). Our proposal outlines a complete modernization of the Board's licensing operations through the implementation of ArcHealth, a proven, scalable, and high-performance licensing platform. In addition to delivering the new licensing system, JD Software will also migrate the Board's outdated website to a modern Content Management System (CMS), providing a secure, accessible, and easily maintained site that aligns with contemporary industry standards.

Our team is eager to discuss how ArcHealth can enhance your online public health capabilities. ArcHealth stands out for its efficiency, seamless integration capabilities, and versatility, making it an ideal choice to meet the regulatory requirements of your license types, reduce administrative workload, and accelerate application processing.

This proposal contains the Technical Response. As requested, we will submit a separate response for Cost. We appreciate your consideration of our proposal and look forward to the possibility of working together.
Sincerely,

Matthew Poussard

Matthew Poussard
Director of Software Development
JD Software
Phone: 978-224-1497
Email : mpoussard@jdsoft.com

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1. Executive Summary

The West Virginia Board of Medicine's mission to protect the health and safety of the public through effective licensure, oversight, and accountability aligns strongly with the work JD Software has delivered for public health agencies for more than a decade. Our team has modernized complex licensing and regulatory environments across multiple health boards, enabling agencies to operate with greater efficiency, transparency, and service to the public.

A key part of our proposal is not only the delivery of a modern licensing and regulatory system but also the modernization of the Board's public-facing website. JD Software will migrate the current site into a secure, modern Content Management System (CMS), providing an updated design, improved accessibility, and an easier editing experience for Board staff. This ensures that both the licensing system and the Board's website reflect the reliability, consistency, and public service standards central to the Board's mission.

Our Proven Record of Success

JD Software has a proven record of delivering transformative licensing modernization initiatives in the public health sector. Most notably, we successfully implemented a new licensing and regulatory system for the Massachusetts Board of Registration in Medicine, replacing a 20-year-old legacy platform that lacked documentation and modernization pathways. Working in close collaboration with the Board, we redesigned every application and complaint form, reimagined workflows, and transitioned the agency to a fully paperless, 100 percent online environment.

As a result, physician license processing times were reduced by 70 percent, earning the project national recognition. The Executive Director of the Massachusetts Board received the Federation of State Medical Boards (FSMB) Award of Merit for the successful implementation of the new online licensing system. The platform also received exceptionally positive feedback from the Conference of Boston Teaching Hospitals, which commended its efficiency, accessibility, and ease of use.

Building on that success, our platform now supports the Massachusetts Department of Public Health (MDPH), managing operations for 28 licensing boards, 184 license types, and more than 600,000 licensed professionals and 25,000 organizations. The MDPH implementation team received the Governor's Performance Recognition Award in both 2023 and 2024, underscoring the lasting impact and public value of our collaboration.

Our Platform

At the foundation of our work is **ArcHealth**, JD Software's configurable, cloud-native licensing and regulatory platform designed specifically for public health and professional regulation. ArcHealth combines the adaptability of a no-code/low-code system with the reliability and scalability of a microservices architecture hosted in FedRAMP-compliant AWS GovCloud. ArcHealth is SOC 2 Type II, HIPAA, and PCI compliant, and meets all the required data protection and privacy standards. The result is a secure, high-performance environment capable of supporting mission-critical operations for health agencies.

ArcHealth enables agencies to easily configure and manage:

- **Data Collection:** Create and manage custom forms for applications, renewals, inspections, complaints, and incident reports.
- **Workflow Automation:** Design and adjust process flows without coding, ensuring alignment with each agency's operational needs.
- **Data Security:** Employ role-based, department-specific access controls to maintain confidentiality and data integrity.
- **Data Insights:** Generate reports, dashboards, and analytics that turn operational data into actionable intelligence for policy and performance decisions.

Our Commitment

JD Software's approach is grounded in collaboration and shared purpose. We work closely with our clients to design systems that not only meet requirements but also elevate how agencies serve the public. We understand that modernizing the West Virginia Board of Medicine's licensing and records system is not merely a technology initiative; it is an opportunity to strengthen how the Board fulfills its mission of safeguarding public health and maintaining professional accountability.

Our proposal reflects a long-term commitment to partnership, performance, and public service. We view this engagement as an opportunity to apply our proven experience, modern technology, and deep respect for the mission of public health regulation.

For JD Software, this work is both a privilege and a responsibility. We are honored to offer a solution and a partnership designed to empower the Board, support its staff, and strengthen the trust between healthcare professionals and the citizens they serve.

2. Response to RFP Project Goals and Proposed Approach

RFP Req #	Requirement Definition	Response
4.2.1.1.	The Vendor and system are intended to provide secure functionality for a replacement and modernization of the WVBOM's legacy content management database system ("Database") and applications/renewal system that collectively improves WVBOM business and process efficiencies with little to no interruption to customers and/or the public, which is also scalable and responsive to change.	The proposed ArcHealth system is designed to meet the requirement for a secure and modern replacement of the WVBOM's legacy content management and applications/renewal systems. ArcHealth operates within a security framework that includes SOC 2 Type 2, HIPAA, and PCI compliance, and is hosted in AWS GovCloud, a FedRAMP-compliant environment. Data is encrypted in transit and at rest, and access is managed through role-based permissions. The system provides a modern, browser-based interface accessible across devices and does not require installation of desktop clients. It supports configuration of workflows, forms, and data elements so that WVBOM can adapt processes as regulations or operational needs change. To limit interruptions to applicants, licensees, and the public, the implementation approach includes coordinated planning with Board staff, user communication support, and features that allow current applicants and licensees to claim their existing accounts and continue in-progress applications. ArcHealth is built on infrastructure that scales automatically with system activity. Current deployments support more than 130 license types, over 1 million license records, and thousands of daily application submissions. This provides capacity for anticipated growth beyond the Board's current and projected record volumes. The system is designed so that administrators—not developers—can make many updates through configuration tools. This enables WVBOM to respond to

		process changes efficiently and without requiring system redevelopment. For more information about the proposed system please refer to section 5 of this document.
4.2.1.2.	The Database should be fully integrated with an online applications/renewals system, disciplinary compliance and monitoring system, and a cloud-based document system.	The ArcHealth platform is designed as an integrated system that brings together online applications and renewals, disciplinary processing, and cloud-based document management within a single environment. **Online applications and renewals:** The external portal allows applicants and licensees to submit applications, complete renewals, and update information as needed. Data collection is configurable by license or application type. License certificates and wallet cards can be generated digitally through the portal. **Disciplinary compliance and monitoring:** The internal administrative portal includes tools for reviewing and approving applications, managing and documenting complaints, recording disciplinary actions, and monitoring compliance conditions such as continuing education or other Board-imposed requirements. **Public license lookup:** A public-facing portal provides search and viewing of designated public information, including license status, credential types, specialties, and any documents the Board elects to make available to the public. **Cloud-based document management:** Document upload fields are available across all modules. Files uploaded to the system are virus-scanned prior to acceptance and then stored in encrypted AWS GovCloud S3 buckets. S3 provides built-in redundancies and object

		replication, ensuring durability and protection against data loss. **System availability and reliability:** The system infrastructure is deployed with high availability as a core design principle. Application services run across multiple availability zones within AWS GovCloud, and the underlying storage and compute layers are configured to maintain operation in the event of hardware failure or increased demand. For more information about the proposed system please refer to sections 5 and 6 of this document.
4.2.1.3.	The new Database should allow for complete data migration from the WVBOM's legacy database and other historical data in possession of the Board. Vendor should describe a recommended approach for the migration of WVBOM's existing data.	The ArcHealth platform supports the full migration of WVBOM's legacy database and any additional historical data maintained by the Board. JD Software will manage this process using a structured, industry-standard data migration methodology tailored to the characteristics of the existing datasets. Data migration is often one of the more complex elements of a system transition, particularly when working with older systems that may contain incomplete or inconsistent information. To reduce these risks, JD Software will begin data discovery and analysis early in the project and coordinate closely with the State's Project Manager and designated staff. A detailed description of our recommended data migration approach is provided in Section 7.3: Data Migration.
4.2.1.4.	The Database and online applications/renewal system should handle all current WVBOM license and credential types and allow for the creation and implementation of future types. The Database should allow for searching, sorting and exporting records and data for staff to manage	**Configuration** The ArcHealth platform is designed to support all existing WVBOM license and credential types and to allow new types to be added as regulatory or operational needs evolve. License structures, application types, renewal paths, and credential configurations are all managed through administrative configuration tools, enabling Board staff to introduce new license categories, update requirements, or modify workflows without system redevelopment. Additional details related to

	records changes and create reports.	application and license configuration are provided in sections 5.20, 5.21, 5.22 and 5.23 of this document. **Search** The system includes comprehensive search, sort, filter, and export capabilities to support day-to-day record management. Staff users can perform multi-field searches across the database, apply filters to narrow results, and export data in standard formats for reporting, reconciliation, or analysis. More information on search is available in section 5.5 of this document. **Reporting and Analytics** Reporting functions, including both predefined and staff-configurable reports, are described in Section 5.12: Reporting and Analytics. These tools allow staff to generate operational, licensing, and compliance reports without requiring vendor support or custom development.
4.2.1.5.	The Database should be integrated with WVBOM's website to allow for certain public data to be available and searchable on the WVBOM's website at no cost to the public.	The ArcHealth platform includes a public-facing license lookup module that can be integrated with the WVBOM website through direct URL links. This approach allows the Board to provide public users with seamless access to designated licensing information without requiring custom development or middleware. Members of the public may access this functionality at no cost, and no authentication or account creation is required. As detailed in Section 5.19: Public License Lookup, the Board may define which data elements are appropriate for public display, including license status, credential type, issuance and expiration dates, and other fields identified by WVBOM. The system provides configurable search capabilities, enabling the public to locate license information using multiple criteria. Search results are generated in real time from the underlying Database, ensuring that the information displayed on the public interface remains current. This integration approach ensures that public licensing data remains accessible and searchable directly from the WVBOM website, while maintaining appropriate

		separation between public access and internal administrative functions.
4.2.1.6.	The Database should be fully integrated with a customizable web-based application and renewal system for all applicants/credential holders (of all current and future types) to fully complete all application/renewal processes online. The online application/renewal system should be accessible through a website portal on WVBOM's website which is fully compatible with mobile devices. The online applications and renewal system should allow for the uploading/downloading of documents, secure communication between applicants/credential holders and the WVBOM, a tracking and notification system, and should permit the applicant/credential holder to self-print and download licenses, wallet cards, permits, registrations, authorizations and certificates.	The ArcHealth platform includes a fully integrated, web-based application and renewal system that supports all current WVBOM license types, as well as additional types the Board may introduce in the future. The application and renewal workflows are configurable by WVBOM staff and operate directly from the underlying Database, ensuring consistency between applicant submissions, administrative review processes, and license/credential records. Details regarding workflow configuration and license-type management are provided in Section 5.2: External module and Section **Document Management** **Applying for a License or Renewal** The online application and renewal system is accessible through a secure external portal that may be linked directly from the WVBOM website. As described in Section 7.13: Applying for a license. The portal is browser-based, requires no installation of client software, and is fully compatible with mobile devices. The interface adapts to varying screen sizes, allowing applicants and credential holders to complete required activities from desktops, tablets, and smartphones. **Document Management** The system supports the electronic submission and receipt of required documentation. Users may upload documents directly through the portal, and Board staff may download submitted materials from the administrative interface. Document-handling capabilities are described in Section 7.8: Document Management and Section 5.10: Document Generation. **Notifications** Secure communication between applicants/credential holders and WVBOM staff is supported through in-portal messaging features, enabling the exchange of instructions, deficiency notices, requests for clarification, and other case-specific communications. Notifications and status updates are available through both on-screen

		alerts and email, as detailed in Section 7.9: Sending Notifications. **Tacking Status** Applicants and credential holders may also track the progress of their applications or renewals through the portal. Status updates are tied to the workflows configured for each license or credential type, providing real-time visibility into review stages and outstanding requirements. **Printing Licenses/Certificates** Upon approval, the system permits users to self-print or download their licenses, wallet cards, permits, registrations, authorizations, and certificates. These digital outputs are automatically generated from approved records. Collectively, these capabilities ensure that the system functions as a unified platform that enables applicants and credential holders to perform all required processes electronically, while providing WVBOM with configurable tools for managing current and future license and credential types.
4.2.1.7.	The system should provide for the processing of payments, assessments and fees, integrating with the WV State Treasurer's "E-Gov" system for electronic revenue.	The ArcHealth platform supports the processing of all payments and fees related to applications, renewals, and other Board transactions. As outlined in Section 5.14: Electronic Payments, the system is designed to integrate with state-designated electronic payment providers and will be configured to work with the State's E-Gov payment system as required. JD Software has experience integrating with various state-approved payment gateways and will align ArcHealth's payment workflows, fee structures, and transaction handling processes with the technical and security specifications provided by the E-Gov system. All transactions are recorded within the Database for reconciliation, reporting, and audit purposes.
4.2.1.8.	The Vendor should describe the interface, capabilities, and user-	ArcHealth includes a secure, cloud-based documentation system integrated across all modules of the platform. Users may upload documents through intuitive drag-

	friendly attributes for a secure cloud-based documentation system.	and-drop fields, and all files undergo automatic virus scanning before being stored in encrypted, redundant cloud storage. Documents are immediately available for authorized staff to view within the system, supporting efficient application, renewal, complaint, and disciplinary workflows. For additional information, please see Section 5.8. Document Management.
4.2.1.9.	Vendor should outline all hardware and software components required to meet the project specifications and to integrate the system with the WVBOM's website. The proposal should identify any features/functionality that exceed the specifications, including whether the vendor has the capability to design, install and host the WVBOM's website.	ArcHealth is a fully cloud-based platform and does not require any on-premises hardware or locally installed software. Users access the system through a standard, modern web browser. All infrastructure, storage, and security functions are managed within the ArcHealth cloud environment. Integration with the WVBOM website is achieved through secure HTTPS links that route applicants, licensees, and the public to the appropriate ArcHealth portals. No specialized hosting environment or custom components are required on the WVBOM website to enable this integration. JD Software has the technical capability to host a public-facing website; however, we do not recommend hosting the Board's current site in its existing form. The site is built on Classic ASP, a legacy framework that is no longer widely supported and does not align with modern security, accessibility, or maintainability standards. JD Software recommends that the Board transition to a modern Content Management System (CMS) to ensure a secure, sustainable, and easily maintained platform that continues to integrate seamlessly with ArcHealth through standard links. JD Software will migrate the Board's existing website to the new CMS-based platform and will provide ongoing hosting, maintenance, and support for the upgraded site.
4.2.1.10	Vendor should describe and provide a detailed plan and timeframe for installing and	The installation and implementation of the new Database and all associated components will follow the phased methodology outlined in Section 7.1: Project Management Approach. This approach includes

	implementing the new Database and all components outlined in the specifications	structured phases for initiation, system configuration, iterative Joint Application Design sessions, data migration, user acceptance testing, training, and final deployment. The overall implementation timeframe and sequencing for these activities are detailed in Section 7.1 and provide a clear roadmap from project kickoff through go-live and post-deployment support.
4.2.1.11	Vendor should describe in detail its approach, methodology and services related to ongoing technical support and maintenance along with the Vendor's staff resources and capabilities, including processing change orders, software/hardware support and updates	JD Software provides a structured approach to ongoing technical support and maintenance that ensures the continued stability, security, and performance of the ArcHealth platform. Our methodology, staffing model, and service framework are outlined in Section 8.1: Support and Maintenance Scope, which describes the full range of support services available throughout the life of the system. Our ongoing support program includes: **Tiered Support Services:** Tier One, Tier Two, and Tier Three support delivered by dedicated technical and application specialists. Support teams manage issue intake, triage, troubleshooting, and escalation following established service procedures. **Change Order Processing:** JD Software uses a formal change-management process to evaluate, estimate, prioritize, and implement requested enhancements or configuration updates. All change orders undergo impact analysis, scheduling, quality assurance testing, and documented approval prior to deployment. **Software Maintenance and Updates:** The ArcHealth platform includes continuous software maintenance, including security patches, bug fixes, third-party library updates, and periodic enhancements. Updates are tested and deployed using standard release procedures defined in Section 8.1. **Hardware and Infrastructure Support:** As a cloud-based system, ArcHealth requires no on-premises hardware. JD Software manages all hosting, infrastructure,

		monitoring, and performance optimization activities within the ArcHealth cloud environment. **Staff Resources and Expertise:** Ongoing support is delivered by a multidisciplinary team including DevOps Engineers, Software Engineers, Database Administrators, and Support Coordinators. This team is responsible for system stability, monitoring, incident remediation, documentation maintenance, and the execution of both routine and emergency releases.
4.2.1.12	Vendor should describe its process for training WVBOM staff on the new system.	JD Software provides a structured training program to ensure that staff are fully prepared to use the new system prior to go-live. As outlined in **Section 7.1: Project Management Approach**, training is delivered after system configuration and User Acceptance Testing are complete, ensuring the material reflects the final system design. The training process includes: **Recorded Training Sessions:** JD Software conducts comprehensive recorded training covering core functions, administrative tasks, and daily operational activities. These recordings remain available for ongoing reference. **Live Training and Q&A:** Live, interactive sessions allow staff to ask questions, explore system features in real time, and receive guided demonstrations tailored to specific workflows. **Written User Guides:** Detailed user manuals are provided to support staff in performing licensing, enforcement, administrative, and reporting tasks. **Video Tutorials for Staff and External Users:** Short, task-specific video tutorials are provided, including topics such as submitting applications, processing renewals, creating user accounts, and filing complaints. This blended approach ensures that staff receive practical hands-on instruction, long-term reference

		materials, and opportunities to clarify questions prior to system deployment.
4.2.2.1.	Database System: The Vendor must provide, install, configure, test, support, and maintain a modernized database for the WVBOM. The solution should have a web-based application that will not have dependence on any desktop client operating hardware or software. From time of award, the vendor shall have the database fully developed, implemented, and operational within 18 months.	We will deliver a modern, cloud-hosted database and licensure platform that operates entirely through a web browser, with no desktop software required. Our team will install, configure, test, and support the system from implementation through ongoing operations. We follow a structured deployment approach that includes configuration, data migration, and user testing. We are very confident in meeting the required 18-month timeline, as we have successfully completed similar projects within this timeframe many times before. Ongoing maintenance, updates, and technical support are provided after go-live.
4.2.2.1.	All data from the WVBOM's legacy database will be migrated. The Vendor will likely need to work with the WVBOM's current provider to migrate all existing data into the new solution.	As outlined in our data migration approach (section 7.3), we will migrate all data from the WVBOM's legacy database into the new system. This includes working directly with the current provider to obtain necessary data files and documentation. Our process uses defined steps for mapping, transformation, testing, and validation to ensure that all historical and active records are accurately transferred before the system goes live.
4.2.2.1.	The Database must be able to store and provide member data for historical recordkeeping, management, data-mining, and reporting purposes.	The system retains all member data permanently and does not delete historical information. All current and past records are stored in a structured, indexed format, allowing staff to view prior entries, track changes over time, and maintain complete longitudinal histories for every member. This ensures the Board has full access to historical data for operational, archival, and management purposes.
4.2.2.1.	The Database should provide for document and data repository capability and indexing capability to store	The system includes a secure, centralized repository for all documents and data associated with applications, renewals, malpractice filings, disciplinary actions, and historical records. All files and images are stored with

	application, renewal, malpractice, disciplinary and historical documents, historical data, and images. Storage of all documentation, information, and materials shall take the place of current historical paper/electronic files and remains the property of the WVBOM.	metadata and indexing to support quick retrieval and consistent organization. The repository is designed to replace existing paper and electronic file collections, and all stored materials remain the property of WVBOM. The system maintains full retention of all documents without deletion.
4.2.2.1.	The Database should provide the ability to add new Member types, credential types and/or sub-types as needed.	The system allows WVBOM staff to add and modify member types, credential types, and sub-types through configuration tools without requiring custom development. New categories can be created as regulatory or operational needs change, ensuring the database remains adaptable over time.
4.2.2.1.	The Database should use Roles Based Access Controls to segregate functions and services at the appropriate operational level based upon need-to-know basis. The solution should have a web-portal dashboard that can allow authorized access for WVBOM staff access.	The system supports both departmental and role-based access controls, ensuring users only access the functions and information appropriate to their responsibilities. Permissions can be configured to align with WVBOM's organizational structure and need-to-know requirements. Authorized staff use a secure web-based dashboard tailored to their assigned department and role.
4.2.2.1.	The solution should provide functionality to generate emails to all or any specific member, or cohort of members, at the WVBOM's convenience for information purposes, without limitations on character counts and to	The system includes tools for sending emails to individual members, selected groups, or the full membership as needed. Messages have no character limits and are stored automatically in each member's record to maintain a complete and legally sufficient communication history.

	maintain a legally sufficient record of any communications for each member.	
4.2.2.1.	The solution should provide for WVBOM branding into screens, webpages, reports, documents, printed licenses, certifications, permits, letters and email correspondence.	The system supports WVBOM branding across all components, including screens, webpages, reports, documents, printed licenses, certifications, permits, letters, and email correspondence. Branding elements such as logos, colors, and headers can be configured and updated by authorized staff.
4.2.2.1.	The system should be compatible with the usage of external APIs to feed information into Member's records. This includes, but is not limited to, VeriDoc, the Federation of State Medical Board (the uniform application for licensure), and the Interstate Medical Licensure Compact Commission.	The system supports integration with external APIs through ArcHealth's micro-webservices architecture. ArcHealth is already integrated with the Federation of State Medical Boards (FSMB) and can accept data feeds from VeriDoc, the Interstate Medical Licensure Compact Commission, and other authorized sources. Incoming data can be automatically matched to and stored within the appropriate member records.
4.2.2.1.1.	**Task Management**: The Database should have functionality that allows WVBOM staff to create and manage workflow for automatic and ad-hoc generated tasks. Task management, user assignment, templates, reports, new member types, and workflow modules should be customizable by WVBOM staff via user interface without custom development, coding, or	The system includes built-in task management tools that allow staff to create, assign, and track both automated and ad-hoc tasks. Workflows, task templates, and user assignments can be configured directly through the administrative interface. WVBOM staff can modify workflow modules, add new member types, and adjust task rules without custom development or coding, ensuring processes remain adaptable to changing operational needs.

	programming to accommodate.	
4.2.2.1.2.	**Auditing**: The solution should provide an audit trail for all scanned, uploaded, stored, archived, and retrieved documents. All changes to data, including audit trails of users making changes, should be stored in a transactional record so historical audit reports can be displayed and generated. The system should accurately record and display the user making the changes and the date and time of the changes.	The system maintains a complete audit trail for all record activity. Any creation, update, or retrieval of a record is logged with the user, date, and time of the action. All changes are stored in a transactional history that allows staff to review prior values, track modifications over time, and generate historical audit reports as needed. For more info refer to section 5.24: Archives and Audit Trails.
4.2.2.1.2.	The solution should allow staff to pull a random percentage of applicants or license holders from the database for auditing purposes.	The system supports this requirement through configurable, canned reports. WVBOM staff can run a report on applicants or license holders, specify a desired percentage, and generate a randomized subset for auditing purposes.
4.2.2.1.3.	**Reporting**: The Database should provide the capability to search, sort, export, and/or create reports that enable WVBOM staff to manage each Member's status at any juncture of the application or renewal process.	The system includes search, filter, and reporting tools that allow staff to track each member's status at any point in the application or renewal process. Staff can create and run reports using configurable criteria (such as license type, status, and workflow step), sort and export results.
4.2.2.1.3.	The Database should allow for daily financial reports of revenue	The system records all payments at the member and transaction level and supports canned financial reports. WVBOM staff can run daily revenue reports broken

	collection broken down by member types as well as totals to prevent staff from needing to access multiple tools to verify payment information.	down by member type, with subtotals and overall totals in a single view. These reports can be exported to Excel or CSV so staff do not need to rely on multiple tools to verify payment information.
4.2.2.1.3.	The solution should allow WVBOM staff to access all fields to create customized reports. This should allow staff to create customized report templates that may be saved and applied to different data and/or record sets.	The system's report builder provides access to all fields in the database so staff can define custom filters, groupings, and output columns. Users can save these configurations as report templates, which can then be reused and applied to different data sets or record types.
4.2.2.1.3.	The system should have the capability to create form letters to inform members and applicants of their current status with the Board and general communication with the Board	The system allows staff to create and use form-letter templates for communicating with applicants. Templates can generate either emails or PDF documents, with fields automatically populated from the member or applicant record. Examples include status updates, approval or denial notices, requests for additional information, renewal reminders, and other Board communications.
4.2.2.1.4.	Disciplinary and Complaints Case Management and Reporting: The solution should provide for disciplinary and complaints case management and reporting. It should allow tracking and managing of complaints, enforcement and compliance activities such as recording complaints received, opening complaints, conducting investigations, managing outcomes, and tracking deadlines and timeframes. The system should have the capacity	The system includes tools for managing disciplinary and complaint workflows from initial intake through final resolution. Staff can record incoming complaints, open and track investigations, document enforcement and compliance actions, and monitor deadlines and required timeframes. Case records support notes, documents, tasks, and status updates. The system is designed to comfortably handle the Board's volume of 500 complaints per year.

	for up to 500 complaints per year.	
4.2.2.1.4.	The system should have the ability to retain historical information about prior complaints indefinitely or subject to the discretion of the WVBOM in accordance with the record retention requirements of the WVBOM.	The system retains all historical complaint information indefinitely or in accordance with WVBOM's record retention requirements. Prior complaints, related documents, notes, and actions remain accessible to authorized staff for long-term reference and oversight.
4.2.2.1.4.	The system should include an auto generated date tracking ability.	The system includes automated date tracking for key case milestones, deadlines, and status changes. Dates are generated and updated by the system as actions occur, ensuring consistent tracking without manual entry.
4.2.2.1.4.	The system should allow the ability to store documents, videos, and audio files with each case.	The system allows staff to attach and store documents, videos, and audio files directly within each case record. These files remain linked to the case for easy reference throughout the complaint or disciplinary process.
4.2.2.1.5.	**Payment**: The system must provide for the processing of payments, assessments and fees, integrating with the WV State Treasurer's "E-Gov" system for electronic revenue and include fee receipts within member's corresponding records.	The system will support payment, assessment, and fee collection through integration with the WV State Treasurer's E-Gov system. All payments are recorded automatically in the member's corresponding record, including fee details and receipts for staff reference and member access.
4.2.2.2	**Cloud Based Documentation Program**: The provided solution(s) should include an integrated and secure cloud-based documentation program whose interface should require minimal steps to access the managed	The system includes an integrated, secure cloud-based document management module with a streamlined interface that allows staff to access managed content with minimal steps. Documents are stored centrally in the cloud and may be viewed, printed, or downloaded based on user permissions. Access to these functions can be restricted by role to align with WVBOM's policies and security requirements.

	content. The cloud-based program should not allow for documentation to be printed off or locally stored on a machine or device.	
4.2.2.2.1	A portal that allows WVBOM staff to securely send or receive confidential documents with an authorized third party. The portal should allow WVBOM staff and WVBOM board members to have secure accounts. The system must allow functionality to limit access to any specific user(s) to workspaces or specific documents/files.	The system includes built-in functionality for securely sending and receiving confidential documents with applicants, staff, and Board members. Users are provisioned with secure accounts, and access can be restricted at the individual level.
4.2.2.2.2	WVBOM staff and board members (at no additional user license cost) to upload documents and audio/video files. File type include, but are not limited to; PDF, DOC, DOCX, XLSX, PNG, JPEG, MP4, MOV.	The system allows WVBOM staff and Board members (at no additional user-license cost) to upload documents and audio/video files directly into the system. Supported file types include, but are not limited to, PDF, DOC, DOCX, XLSX, PNG, JPEG, MP4, and MOV.
4.2.2.2.3	All uploaded documents, videos, audio files, etc. should be viewable within the portal without system delay.	All uploaded documents, videos, audio files, and other supported formats are viewable within the system without noticeable delay. Files open directly in the system's viewer, allowing staff and Board members to review content quickly without requiring external applications.
4.2.2.3	**Application/Renewal System via Website Portal:** The Vendor should provide and design an integrated website portal accessible through the WVBOM's	The system includes an integrated online portal accessible through the WVBOM website. The portal is fully connected to the database and cloud-based documentation program, allowing information to move accurately and seamlessly between components. Members can access the portal at no cost to complete required actions, and WVBOM staff have administrative

	website (https://wvbom.wv.gov). The website portal should be fully integrated with the Database and Cloud Based Documentation Program to allow for accurate and seamless transfer of data and information as needed. The website portal should allow for a secure portal for members to perform the following functions, without any cost from the Vendor to members. In addition, it should allow administrative access to the WVBOM staff to review, manage, and edit all actions and functions below.	access to review, manage, and edit all member-submitted information and activity.
4.2.2.3.1	The portal should contain an application and renewal system for all WVBOM credential types which allows members to access a centralized dashboard that will provide them with real-time information concerning their member status, application and renewal application status, and the individual's historical record with the WVBOM. The website portal	ArcHealth provides modern web interfaces for all WVBOM credential types, supporting both application and renewal processes. Members can log in through these interfaces to view real-time information about their license status, the progress of their application or renewal, and their historical record with the Board. Members may also print or download any correspondence generated by the WVBOM.

	should have the capability to allow Members to login and see their record, print and download a copy of any correspondence generated by the WVBOM.	
4.2.2.3.2	Members should be able to login to see their portal using their email address as a username and a customizable password. The password should contain at least eight (8) letters, at least one (1) capital letter, number, and symbol	Members can log in using their email address as their username and a customizable password. The system enforces strong password requirements, including a minimum of eight characters with at least one capital letter, one number, and one symbol.
4.2.2.3.3	Members should be able to update/change their username (i.e. email) and/or password after logging in. There also should be a secure retrieval system and link to allow member to reset their within a set time frame. No account may use the same email address.	Members can update their email address and password after logging in. The system includes a secure password-reset process that sends a time-limited recovery link to the member's email. Each account must use a unique email address, and duplicate emails are not permitted.
4.2.2.3.4	The website portal should employ an address verification tool for all address fields. This also should employ uniform formatting for similar field types, such as telephone numbers. Through this portal, members should have the ability to provide a change in contact	The system validates key fields such as phone numbers, ZIP codes, and email addresses and applies consistent formatting to ensure accuracy. Full address verification is planned for a future release. Members can update their contact information online. Certain updates such as name changes or address changes that impact an active license are completed through amendment applications. These changes require WVBOM staff review and approval before they take effect. All updates are recorded in the licensee's change history.

	information online (i.e. address(es), telephone number(s), email. The system should allow any functionality which allows members to change their information and include additional functionality which allows WVBOM staff to review, revise, and approve such changes before they take effect. The system should record all changes related to a member's contact information.	
4.2.2.3.5	The portal should allow for complete administrative access and oversight by WVBOM staff that allows the capability for staff to review applications and documents submitted by members prior to approval/denial.	The system provides full administrative access for WVBOM staff through a single-screen, easy-to-use interface. Staff can review all application information and uploaded documents in one place before making an approval or denial decision. This supports efficient oversight and consistent evaluation of all submissions.
4.2.2.3.6	The application and renewal system should permit WVBOM staff to customize, modify and create applications, and application content, as needed. It should maintain legally sufficient archival copies of all prior iterations of all applications which have been utilized by any member. Board staff should be able to obtain a true and complete copy of all application	WVBOM staff can customize, modify, and create application forms and content as needed. The system automatically creates a snapshot PDF of each application at the time of submission. If an application is reopened and resubmitted, a new snapshot is generated. These snapshots preserve the exact questions and responses as they existed on the date of submission, even if application content changes over time. Application content that is shared across multiple license types can be transferred between application types. The underlying metadata for each application element is stored in the database, and the system includes

	questions and content as viewed by a member and which was in use on a specified date. Application content which is common to multiple member types should be easily transferable from one application type to another.	administrative routines to move this content from one license type to another as needed.
4.2.2.3.7	WVBOM staff should be able to save or print any member forms (including applications, communications, reports, and supporting documentation) from the member's access on the website and back office. Staff should be able to revise applications, hold applications, or archive applications depending on the status of the application. It should allow staff to place documents for any member or group of members in a chronological sequence and allow for future deletion according to the WVBOM's document retention policy. This portal should be a customizable workspace depending on the tasks needed to be performed by WVBOM staff.	WVBOM staff can save or print any member forms, including applications, communications, reports, and supporting documentation. Staff can revise applications, place them on hold, or archive them depending on their status. Documents for any member can be organized in chronological order. Documents may be deleted in accordance with WVBOM's document retention policy. The internal staff interface allows adjusting views and tools based on the tasks a user needs to perform.
4.2.2.3.8	The portal should have the ability to save any application or renewal process and go back later to pick-up where they left off. The MD	Members can save an application or renewal in progress and return later to continue from where they left off. For MD applicants, the system interfaces with the Federation of State Medical Boards' Uniform Application and the Federation Credentials Verification Service,

	application portion must be able to interface with the Federation of State Medical Boards Uniform Application and Federation Credential Verification Service packet so that applicable Members are able to electronically transfer data from that system into this one.	allowing applicable users to electronically transfer their data into the system.
4.2.2.3.9	The website portal must generate a legally sufficient and accurate record of a member's final responses to all application questions. At a minimum, for a legally sufficient and accurate record, include:	The system generates a legally sufficient and accurate record of a member's final responses to all application questions. At submission, the system creates a snapshot PDF that captures every response exactly as entered and the full set of questions presented at that time. If an application is reopened and resubmitted, a new snapshot is created. These records ensure the Board has a complete and accurate copy of the application as it existed on the date of submission.
4.2.2.3.9.1	Mirror all written content and application instructions as viewable by members.	The system records all application text and instructions exactly as presented to the member, ensuring the archived copy matches what the member saw at submission.
4.2.2.3.9.2	Accurately reflect the information entered and saved by members in response to each question.	The system captures each response exactly as entered and saved by the member.
4.2.2.3.9.3	Be automatically saved in .PDF format within each member's database record resources	Each submitted application record is automatically saved as a PDF and stored in the member's database record.
4.2.2.3.9.4	Contain Member identity and page number information on each page of the PDF.	Each PDF includes the member's identity and page numbers.

4.2.2.3.9.5	Include the date of electronic submission by member.	The PDF includes the member's electronic submission date.
4.2.2.3.9.6	Utilize readable font no smaller than visual size of 11-point Times New Roman font.	All generated PDFs use a readable font no smaller than the visual equivalent of 11-point Times New Roman.
4.2.2.3.9.7	Be accessible to the member through the member's portal.	The last submitted application is accessible to the applicant through the external web portal.
4.2.2.4 4.2.2.4.1	**Data and Compliance** All systems utilized by the WVBOM contain information related to Health Insurance Portability and Accountability Act (HIPAA) and Personally Identifiable Information (PII) and all solutions must have a compliant level of security to handle confidential information and communications. Vendor must provide third-party documentation verifying compliance upon request.	ArcHealth is HIPAA compliant and supports the secure handling of all protected and personally identifiable information. The system applies industry-standard safeguards to protect confidential data and communications. Third-party documentation verifying HIPAA compliance can be provided upon request.
4.2.2.4.2	The website, database and all deliverables must satisfy the Web Content Accessibility Guidelines (WCAG) 2.1, Level AA, and any other relevant accessibility standards to ensure accessibility for individuals with	ArcHealth is designed to meet WCAG 2.1 Level AA accessibility standards across the website and all system deliverables, ensuring usability for individuals with disabilities. A current VPAT confirming accessibility conformance can be provided upon request.

	disabilities. Vendor must provide third-party documentation verifying compliance upon request.	
4.2.2.5	**Ongoing Maintenance and Support**: Following implementation of the system the Vendor should provide ongoing maintenance and support to the WVBOM. Vendor should have sufficient staffing and personnel to provide immediate support if necessary.	As outlined in Section 8.1: Support and Maintenance Scope, JD Software provides full ongoing maintenance and support for ArcHealth, including incident response, routine updates, security monitoring, and system health checks. JD Software maintains staffed Tier One, Tier Two, and Tier Three support teams to ensure timely assistance when needed. ArcHealth operates under a formal Service Level Agreement committing to 99.95% uptime, as detailed in the SLA section.
4.2.2.5	Vendor should provide a help desk service via telephone and remote desktop support to both WVBOM staff and end user members. This includes support to WVBOM administrative users and IT staff for configuration to the database, applications, website portal and cloud-based program.	JD Software will provide telephone and remote desktop support to WVBOM staff for all components of the ArcHealth system. End users (licensees) will not contact JD Software directly; however, we will work with WVBOM staff to troubleshoot and resolve any technical issues reported by members. Support will cover all system functions, including configuration and assistance with the application interfaces, web-based components, and the cloud-based documentation program.
4.2.2.5	During the life of the contract, Vendor should make available to the WVBOM all new software versions and patches of defects.	JD Software will provide WVBOM with all new software versions, updates, and defect patches released during the life of the contract. These updates will be applied as part of ongoing maintenance to ensure the system remains current, secure, and fully supported.

4.2.2.5	Vendor should provide support to the WVBOM in making necessary modifications, additions, change orders, customizations, and/or corrections to defects in the systems.	JD Software will support WVBOM with any required modifications, additions, change requests, and corrections to defects in the system. These activities will be handled through established maintenance and change-management processes to ensure updates are implemented accurately and with minimal disruption.

3. Response to RFP Qualifications and Experience

RFP Req #	Requirement Definition	Response
4.3.1.1.	The Vendor should propose a staffing plan that identifies staff that can meet the unique needs of the WVBOM while assuring that services are provided in the most economical manner. In their proposal, the Vendor should describe how the staffing plan will provide the skills necessary to meet the requirements of the project throughout the life of the contract. This includes indicating how many agents would be involved in the creation and implementation phase, as well as for ongoing support and maintenance.	JD Software will provide a staffing structure that meets the unique operational and regulatory needs of WVBOM while maintaining an efficient and economical approach. The project will be supported by a core team of full-time personnel including Project Management, Software Engineering, Quality Assurance, and DevOps. Each team member has experience delivering large-scale licensing systems similar in scope to this project. Please see Section 4.3.1.1. Staffing Plan for a proposed staffing plan.
4.3.1.2	The Vendor should supply documentation/references showing their track record of previous experiences with similar projects in scope/size for professional licensing boards	JD Software has a strong record of delivering licensing systems for state medical and professional regulatory boards. ArcHealth currently supports more than 600,000 licensed healthcare professionals across over 200 license types, demonstrating our experience with large-scale, multi-credential environments.

		Section 4.3.1.2: References provide contact information for agencies that can speak to our performance and experience implementing systems comparable in scope and complexity to the needs of the WVBOM.
4.3.1.3	Vendor should propose a strategy to migrate data between the Board's legacy database and the proposed solution.	JD Software will migrate the Board's legacy data using the structured, industry-standard approach described in Section 7.3. Our process begins with a detailed assessment of the legacy datasets in a secure staging environment, where we review data structures, identify dependencies, evaluate data quality, and document any issues along with remediation options. Based on this assessment, JD Software will develop tailored Extract, Transform, and Load (ETL) workflows to cleanse, standardize, map, and validate the data against the new system's schema. These ETL processes will be refined through multiple test loads and validation cycles in a QA environment, allowing Board staff to confirm accuracy, completeness, historical preservation, and data relationships. Once validation is complete, JD Software will perform the final extraction and load into the production environment, followed by integrity checks and staff verification prior to go-live. This methodology has been successfully applied in other state licensing migrations, including those involving incomplete or inconsistent legacy data.
4.3.1.4	The Vendor should provide information in regard to any other services they provide including, but not limited to, website creation, hosting, and domain forwarding.	JD Software will support WVBOM with related services beyond the licensing system. We will migrate the Board's existing website into a modern content management system to provide a secure and easily maintained platform. We will host and maintain the updated site and ensure it integrates cleanly with ArcHealth. We will also work with the State's IT team so that all system URLs use the appropriate *.wv.gov domain, which requires only standard state-issued certificates rather than domain forwarding.

4.3.2.1	The Vendor must have successfully migrated data and supplied and supported a licensing database substantially similar to the specifications herein to another professional licensing board of a state or territory of the United States within the last three (3) years. Vendor must provide documentation verifying compliance upon request.	JD Software can support WVBOM with related services beyond the licensing system. We will work with the State's IT team to ensure that all system URLs use the *.wv.gov domain. This does not require domain forwarding; only appropriate state-issued certificates are needed. We can also migrate the existing WVBOM website into a modern content management system and provide secure hosting and maintenance for the site, ensuring consistency, reliability, and ease of updates.
4.3.2.2	The Vendor must have at least three (3) years' experience in providing ongoing maintenance and support for a licensing database substantially similar to the specifications herein to another professional licensing board of a state or territory of the United States. Vendor must provide documentation verifying compliance upon request.	JD Software meets and exceeds this requirement. We have more than fifteen (15) years of continuous experience providing ongoing maintenance and support for licensing systems used by state professional licensing boards, including systems significantly larger and more complex than the one specified in this RFP.
4.3.2.3	The Vendor shall be an authorized reseller, owner, or explicitly authorized to transfer intellectual property, with documented experience supporting the ability to sell, service, and/or support the hardware or software proposed in this RFP. Vendor must provide documentation verifying compliance upon request.	JD Software is the sole owner of ArcHealth and holds all associated intellectual property rights. As the developer and IP holder, JD Software is fully authorized to license, implement, support, and service all components of the software.

4.3.1.1. Staffing Plan

JD Software will provide a staffing structure that meets the unique operational and regulatory needs of the WVBOM while maintaining an efficient approach. The project will be supported by a core team of full-time personnel including Project Management, Software Engineering, Quality Assurance, and DevOps. Each team member has experience delivering large-scale licensing systems similar in scope to this project.

The project will be led by Matthew Poussard, Director of Software Development, who will serve as the Lead Technical Project Manager and the primary point of contact for the State. Mr. Poussard has more than twelve years (12) of experience with JD Software and has overseen the successful implementations of several eLicensing systems including:

- Massachusetts Board of Registration in Medicine eLicensing System
- Massachusetts Bureau of Health Professions Licensure eLicensing System
- Massachusetts Bureau of Climate and Environmental Health eLicensing System
- Massachusetts Bureau of Substance Addiction Services eLicensing System
- Massachusetts Cannabis Industry eLicensing System
- Massachusetts Medical Use of Marijuana eLicensing System

Mr. Poussard's has successfully led multiple similar licensing projects and will apply the same experience and approach to this implementation.

During implementation, the team will include Project Managers, Software Engineers and DevOps Engineers responsible for the configuration, integration, data migration, testing, and deployment. As the system moves into production, the same core team will remain in place, supported by additional maintenance and support personnel as needed to ensure stable, continuous operations.

A summary of key project personnel is provided below:

Team Member	Job Title	Education	Employment Duration
Lhassan Oubala	CEO	- MS Mathematics - M.Eng in Computer Science	25 years
Matthew Poussard	Director of Software Development	- Undergraduate Certificate in Computer Science - BA International Relations	12 years
Mouhcine Makroume	Lead DevOps Engineer	- MS in Information Management Systems	12 years

		- BS in Information Technology	
Brett Grossman	Software Engineer	BS in Computer Science	7 Years
Taha Khan	Software Engineer	MS in Computer Engineering	6 years
Andrew Seedholm	Software Engineer	MS in Computer Science	4 years
Guillermo Gutierrez	Software Engineer	BS in Computer Science	4 years
Jason McAdam	Project Manager	BS in Mathematics	3 years
Abdellah Ahbane	DevOps Engineer	M.Eng in Computer Engineering	3 years
Ziyun Lee	Software Engineer	BS in Computer Science	3 years
Robert Martini	Software Engineer	BS in Computer Science	3 Years
Meredith Fanning	Multimedia Specialist	BA in Visual and Critical Studies	3 years
Ziyun Li	Lead Software Engineer	BS in Computer Science	3 Years
Nikhil Gunale	Software Engineer	MS in Computer Science	3 Years
Laura Wikoff	Project Manager	BS in Computer Science	3 Years
Ameya Apte	DevOps Engineer	MS in Information Systems	1 year

Andrew Angulo	Software Engineer	BS in Computer Engineering and Computer Science	1 year
Lucas Gustafson	Software Engineer	- BA English - MS in Computer Science	1 year
Sean McDowell	Project Manager	BA Psychology	1 year
Engjell Ramadani	Junior Software Engineer	- B.S. Computer Science	1 year

We are confident in our team's ability to deliver, having successfully implemented ArcHealth for approximately thirty licensing bodies across multiple state agencies, and we will bring that same proven experience to this project.

4.3.1.2. References

Reference 1	Detail
Company Name:	Massachusetts Board of Registration in Medicine
Company Address:	200 Harvard, Mill Square Road, Unit 330, Wakefield, MA 01880
Type of Industry:	Government
Contact Name:	George Zachos, Executive Director
Contact Phone Number:	781-876-8228
Contact Email Address:	george.zachos@mass.gov
Description of system(s) implemented:	Implemented the Board of Registration in Medicine's electronic licensing system using ArcHealth
Date of Implementation:	November 2022
Reference 2	**Detail**
Company Name:	Massachusetts Board of Registration in Medicine
Company Address:	200 Harvard, Mill Square Road, Unit 330, Wakefield, MA 01880
Type of Industry:	Government

Contact Name:	Dennis Hanson, Senior IT Project Manager
Contact Phone Number:	703-795-0200
Contact Email Address:	dennis.hanson@state.ma.us
Description of system(s) implemented:	Massachusetts Board of Registration in Medicine's Electronic Licensing System, which included 26 boards, 144 license types
Date of Implementation:	November 2022
Reference 3	**Detail**
Company Name:	Massachusetts Bureau of Health Professions Licensure
Company Address:	250 Washington St., Boston, MA 02108
Type of Industry:	Government
Contact Name:	Chris Burgess, Senior IT Project Manager
Contact Phone Number:	857-378-6667
Contact Email Address:	Christopher.J.Burgess@mass.gov
Description of system(s) implemented:	Implemented the Bureau of Health Professions Licensure's eLicensing System over the course of two years.
Date of Implementation:	September 2022 - January 2024

4. JD Software Qualifications and Past Experience

JD Software has a proven record of delivering transformative licensing modernization initiatives in the public health sector. We are an experienced team of GovTech professionals based in Massachusetts, specializing in electronic licensing and case management systems. Our extensive expertise, coupled with our unwavering dedication to our clients—whom we regard as partners—distinguishes us in our industry. This commitment enables us to consistently deliver exceptional results on complex licensing projects for the State of Massachusetts. After working with JD Software, our partners have been recipients of prestigious awards. The Executive Director of the Massachusetts Board of Registration in Medicine received the Federation of State Medical Boards Award of Merit for the successful implementation of our new online licensing system. Also, the Massachusetts Department of Public Health implementation team received the Governor's Performance Recognition Award in both 2023 and 2024, underscoring the lasting impact and public value of our collaboration.

Our success is also deeply rooted in the capabilities of our proprietary solution, ArcHealth. This specialized Software as a Service (SaaS) platform is tailored to address the unique requirements of licensing systems. Built from the ground up with licensing needs in mind, it doesn't impose any assumptions about our clients' workflows and business processes. This inherent flexibility means ArcHealth can adapt to and meet most agency requirements out of the box, enabling us to deliver our commitments quickly and efficiently.

In essence, our recipe for success is a combination of a client-centric philosophy and a highly adaptable, specialized software solution. Together, these elements enable us to consistently deliver robust, high-quality results that meet the specific needs of our clients and their stakeholders. We're pleased to highlight several notable projects from our portfolio that showcase our expertise in tackling complex challenges and creating efficient systems.

4.1. Massachusetts Physician Online License Management System

Our partnership with the Massachusetts Board of Registration in Medicine (BORIM) resulted in a 73% reduction in average application processing time and recognition from the Federation of State Medical Boards (FSMB). We partnered with BORIM to upgrade their system from outdated legacy applications to a cutting-edge online licensing platform for physicians and acupuncturists. Initially, BORIM had engaged a large consulting firm to implement a licensing solution based on Salesforce. However, they discovered that Salesforce did not meet their system requirements without extensive customizations, leading to significantly increased costs. After BORIM terminated the contract with their consulting firm, they hired JD Software to develop a solution and streamline the licensing process. We implemented ArcHealth, a solution meticulously tailored to the complexities of the licensing domain. Following its launch in November 2022, ArcHealth helped BORIM reduce its average licensing application processing time by an impressive 73%, showcasing ArcHealth's superior efficiency and effectiveness. Additionally, ArcHealth's seamless integration with critical entities such as the Federation of State Medical Boards, The Massachusetts Trial Court, OnBase, and Catalis (NCourt), underscores its robust capability and adaptability within a complex and multifaceted regulatory environment.

Moreover, the system is also used by 150 users from Massachusetts Teaching Hospitals to manage licensing for residents through a dual application process, initiated by the resident and completed by the teaching hospital. JD Software closely collaborated with BORIM and the Teaching Hospitals to create a specialized module to be used by the hospitals for managing resident licensing. This collaborative effort resulted in a system that effectively met the unique needs of these institutions. Since its launch, the feedback from The Conference of Boston Teaching Hospitals, a non-profit dedicated to supporting Boston's teaching hospitals, has been overwhelmingly positive, highlighting our capability to partner effectively and deliver impactful results. This successful collaboration with BORIM and the Teaching Hospitals demonstrates our proficiency in developing specialized technological solutions for complex organizational needs. In 2024, FSMB recognized BORIM's Executive Director with its Merit Award, highlighting our client's achievement in advancing public service excellence.

4.2. Massachusetts Bureau of Health Professions Licensure (BHPL)

We also partnered with the Massachusetts Bureau of Health Professions Licensure (BHPL) to build the Health Professions Licensing System, an ambitious platform that brought together 26 licensing boards and now manages licenses for over 600,000 professionals and 10,000 organizations.

The following is the list of Boards included in this implementation:

- Board of Allied Health Professions
- Board of Certification of Community Health Workers
- Board of Registration for Speech-Language Pathology and Audiology
- Board of Registration in Dentistry
- Board of Registration in Naturopathy
- Board of Registration in Nursing
- Board of Registration in Optometry
- Board of Registration in Pharmacy
- Board of Registration in Podiatry
- Board of Registration of Allied Mental Health and Human Services Professions
- Board of Registration of Chiropractors
- Board of Registration of Dietitians and Nutritionists
- Board of Registration of Dispensing Opticians
- Board of Registration of Genetic Counselors
- Board of Registration of Hearing Instrument Specialists
- Board of Registration of Nursing Home Administrators
- Board of Registration of Perfusionists
- Board of Registration of Physician Assistants
- Board of Registration of Psychologists
- Board of Registration of Social Workers
- Board of Respiratory Care
- Massachusetts Controlled Substances Registration
- Nurse Aide Registry

- Office of Emergency Medical Services
- Office of Local and Regional Health
- Pharmaceutical Device Manufacturer Code of Conduct

The system was successfully integrated with a wide range of national health professions associations and credentialing organizations, including the Association of Social Work Boards, the National Association of Boards of Pharmacy, the National Council of State Boards of Nursing, the National Registry of Emergency Medical Technicians, Pearson VUE, TMU, Virtual, and Catalis (NCourt).

Completed in nine phases over two years, the system now streamlines licensing and enforcement for over 500,000 health professionals and thousands of organizations across Massachusetts.

With ArcHealth's state-of-the-art configurability, we met the regulatory requirements of each licensing Board using out-of-the-box functions of the system, while simultaneously streamlining business operations. We further optimized each Board's procedures by integrating with a wide range of national health professions associations and credentialing organizations, including the Association of Social Work Boards, the National Association of Boards of Pharmacy, the National Council of State Boards of Nursing, the National Registry of Emergency Medical Technicians, Professional Credentialing Services, and Pearson VUE. The project's success highlights ArcHealth's adaptability as a SaaS solution, our strong collaboration with State agencies, and our commitment to ensuring seamless continuity from legacy systems.

4.3. Massachusetts Cannabis Industry Portal

JD Software was instrumental in delivering MassCIP, the statewide platform that manages adult-use marijuana regulation across Massachusetts. The project demanded rapid execution, support for 30 intricate license types, and seamless integration with numerous state and third-party systems. At the time, the Massachusetts Cannabis Control Commission was a newly formed agency with only a small team in place. Despite these hurdles, our team successfully designed and launched the system in an extraordinary five weeks.

In a public meeting following the system launch, the Chairman of the Massachusetts Cannabis Control Commission stated: *"I just wanted to thank our software partner JD Software. In a very short period of time, they have hit every one of their commitments, they have been great to work with, and have been flawless in their execution"*. This commendation exemplifies our unwavering commitment to not only deliver on promises but exceed expectations, even when faced with high-pressure environments and complex challenges.

4.4. Massachusetts Medical Use of Marijuana Online System

JD Software played a pivotal role in the development and implementation of the Massachusetts Medical Use of Marijuana Online System (MMJ). This comprehensive system has been designed to manage the complexities of the medical marijuana industry, providing a unified platform for registering and interfacing various stakeholders, including physicians, patients, caregivers, dispensary agents, state employees and law enforcement.

Since its inception in October 2014, MMJ has handled a staggering volume of over 250 million transactions, demonstrating its robustness and reliability. The system's efficient design and operation have resulted in the streamlined management of medical marijuana sales across the state.

MMJ showcases the depth and breadth of our integration capabilities. It is seamlessly integrated with the Massachusetts Registry of Motor Vehicles, the Massachusetts Criminal Justice Information System, nCourt (ePay vendor) and Idemia (third-party card printing vendor). These integrations have allowed real-time access for law enforcement and a more coherent, connected experience for all users.

Our work on the MMJ system underscores our commitment to developing adaptable, efficient, and user-friendly systems that can handle high volumes of complex transactions while integrating with a variety of state and third-party systems.

5. Proposed Solution

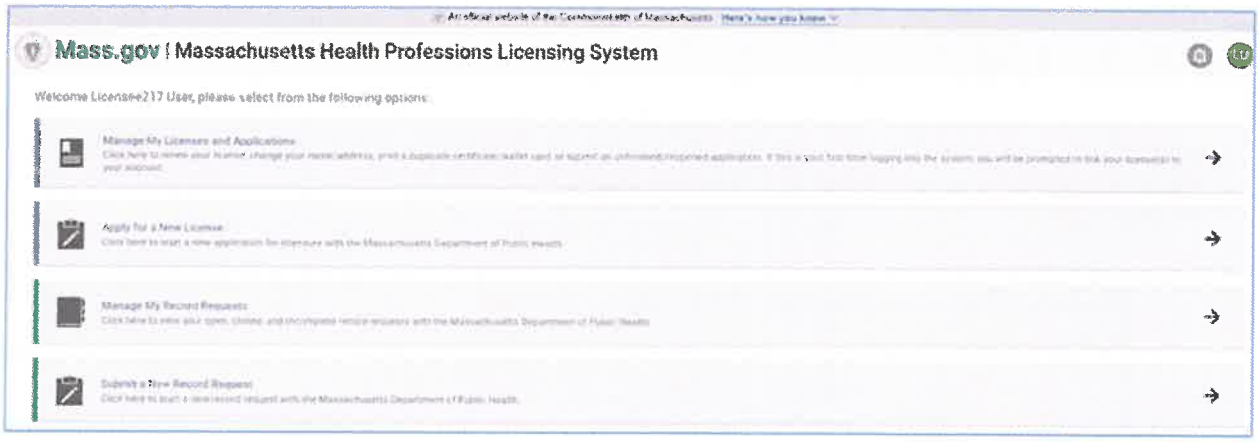
The proposed solution below provides additional details explaining why our approach is superior to other possible alternatives.

5.1. ArcHealth Overview

ArcHealth is a cloud-native, Software as a Service (SaaS), web-based eLicensing platform tailored for the comprehensive management of health professions licensing. ArcHealth supports all modern browsers and mobile devices. Designed with modernity, configurability, and scalability at its core, it meets the intricate demands of government operations. ArcHealth encompasses a suite of core functionalities:

5.2. External Module

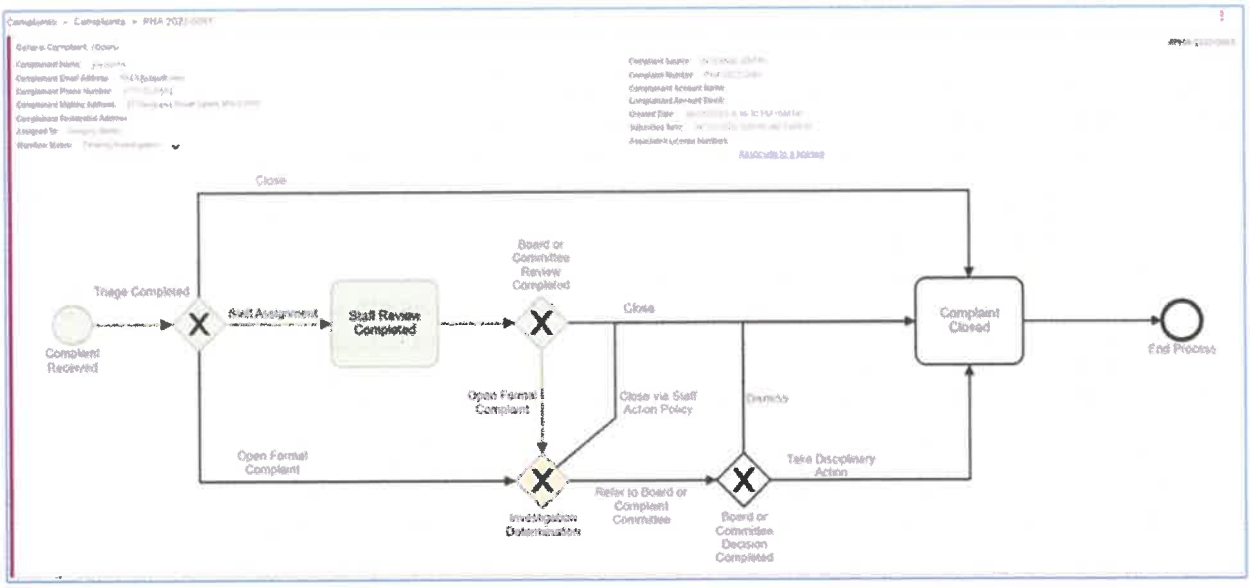
Facilitates license management for individuals and organizations, offering features for account creation, document upload, form completion, fee payment, license renewal, and on-demand printing of certificates and cards. Enhanced by automated license expiration email reminders, this module ensures efficient licensee communication and application status transparency, also supporting public records requests with an intuitive interface.



Home page of External Module

5.3. Internal Module

Empowers Board, licensing, and investigative staff with a streamlined interface for operations, featuring quick access to searches, tasks, reports, and record management. It organizes records for easy auditing, version tracking, document management, and implements a robust Business Process Management (BPM) workflow with role-specific task completion grants.



Example Workflow for an Investigative Case

5.4. Public Module

Provide no-login-required services for transparent engagement with the public, government bodies, and stakeholders. Features include a license verification site displaying comprehensive licensee data, an electronic complaints submission portal, and a facility for licensees to report incidents or serious events to their Boards.

Example of the Board of Registration in Medicine's Public search

Example of a Physician's Public Profile

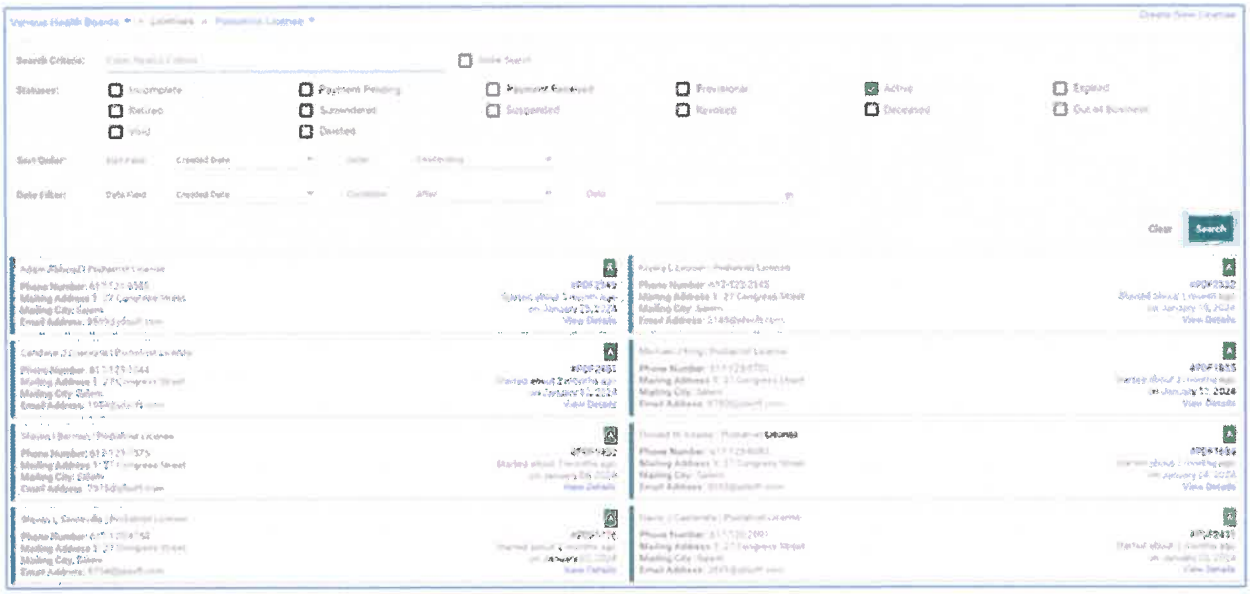
5.5. Search Capabilities

ArcHealth incorporates a Google-like search engine, providing two key search options:

Standard Search: This feature uses a predefined set of fields, adjustable according to specific needs. For instance, when searching for licenses, relevant fields include license number, last name, first name, address, phone number, and email.

Global Search: Users can initiate a comprehensive Global Search by selecting a dedicated checkbox. This option searches across all record fields, allowing for thorough queries without being restricted to certain fields.

Both searches support status and date range filters, offering users the ability to organize search results by their preferred field. Furthermore, the system is designed to cater to the unique needs of various record types (e.g., Applications, Licenses, Inspections, Complaints, Incident Reports, Record Requests), with each possessing its own customizable search functionality for enhanced precision. For further clarification, refer to the below figure, which provides an example of the search interface.

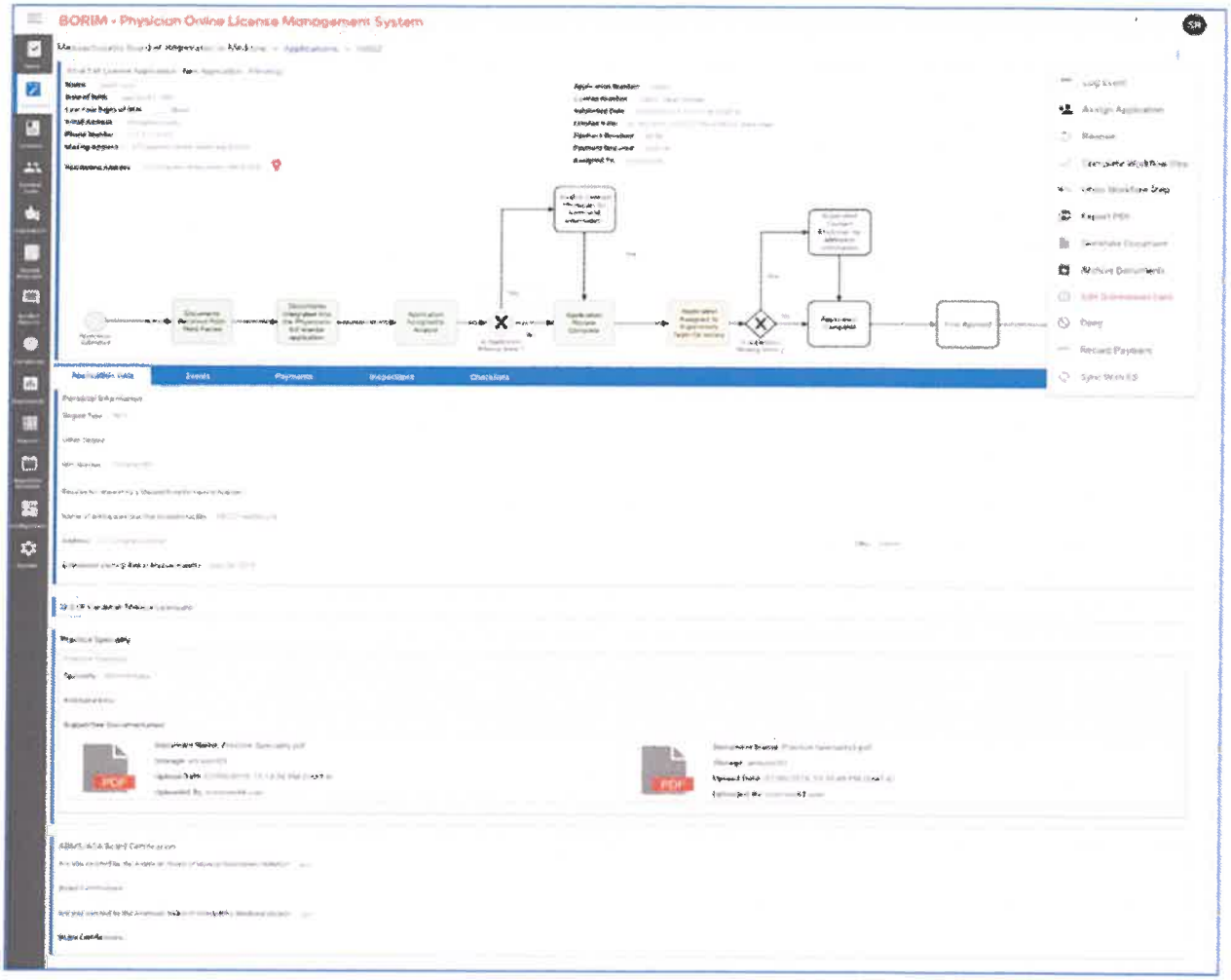


Example Search Interface

5.6. Application Review and Staff Processing

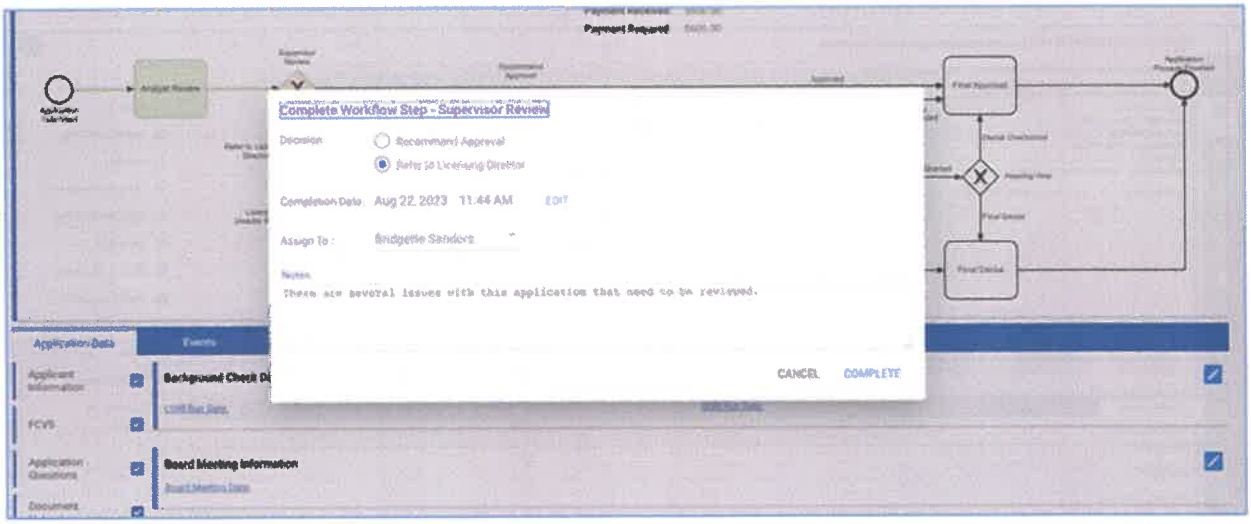
The system features a user-friendly, single-page interface for a comprehensive review of all field data related to an application, including any documents uploaded to the record. This interface also allows authorized users to perform workflow steps associated with the entity. Notably, it displays a BPMN (Business Process Modeling and Notation) workflow diagram, clearly indicating the record's current position in the process. Steps already completed are highlighted in green, while the current step is marked in yellow, enabling users to swiftly discern the record's progression through the workflow.

Authorized users have the capability to access a detailed history of the record, make necessary edits, and undertake various actions, such as advancing workflow steps or reassigning the record to another staff member. This efficient interface is designed to enhance user experience and facilitate effective processing. An illustration of the license application main page is presented below for reference.



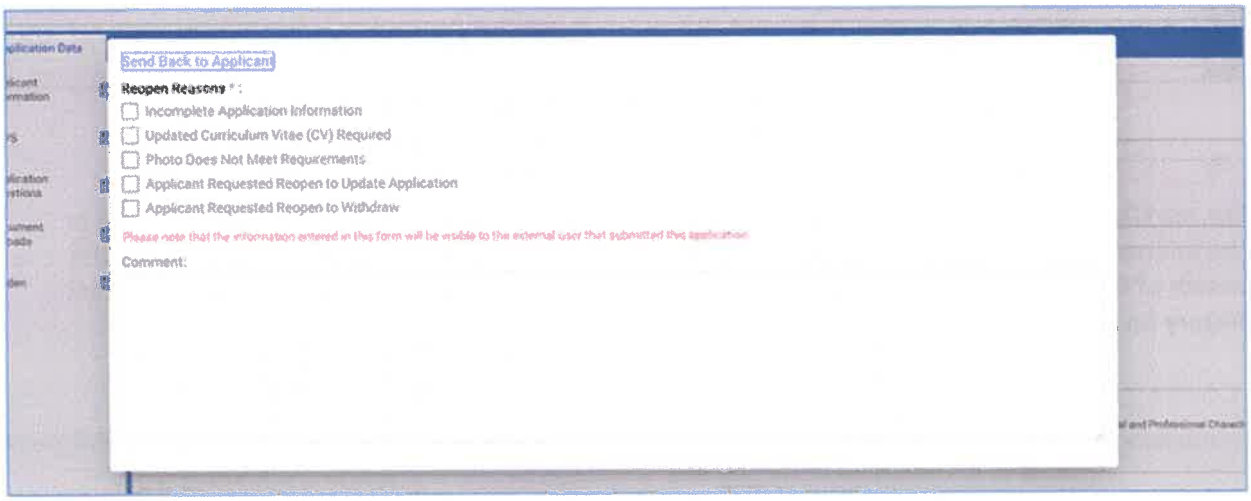
ArcHealth Example Application Review Interface

For workflow processing, the user simply chooses the appropriate action from the menu and fills in the information in the provided popup, as depicted in the subsequent figure. This input, along with details of the user completing the step and any relevant notes, is systematically logged in the event history for the record.



ArcHealth Application Workflow Step Completion Interface

Furthermore, authorized users are equipped with the "Send Back to Applicant" feature, allowing them to return an entity to the submitter if needed. This functionality provides an avenue for specifying the reasons for the return, along with additional clarifications or instructions as required. There is also an option for these reasons and instructions to be communicated to the applicant via a notification, which will be visible in the user interface upon their next login. After this action is executed, the submitter has the opportunity to make the required adjustments and resubmit the application to the board. For a clearer understanding, a depiction of the "Send Back to Applicant" interface is provided in the figure below.

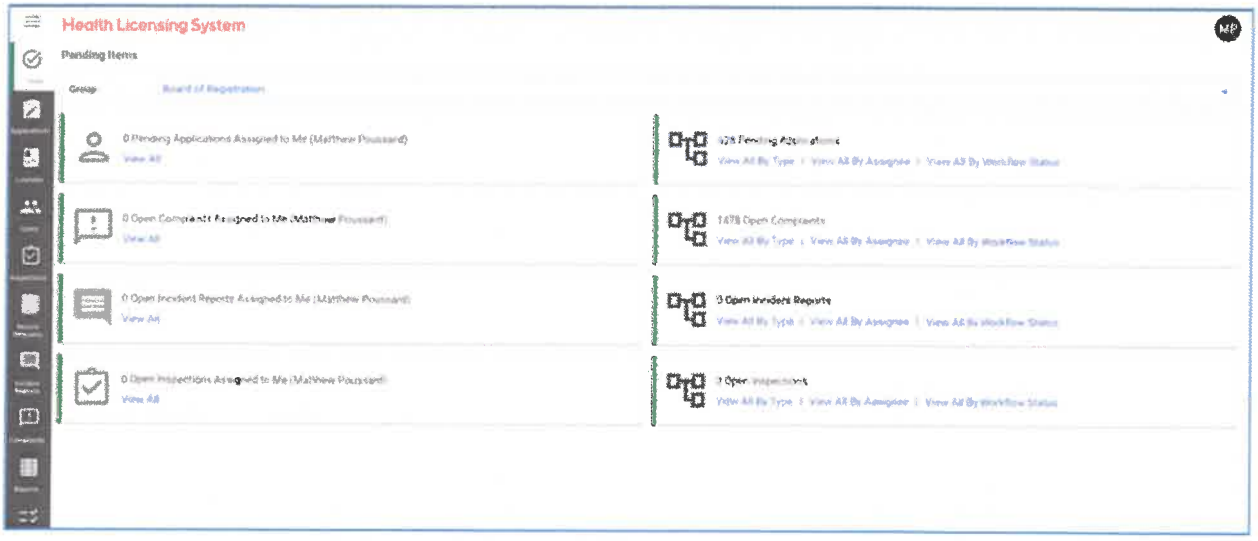


ArcHealth Send Back to Applicant Interface

5.7. Tasks Dashboard

When a user initially logs into the system, they are directed to the Tasks Dashboard. This page displays various pending items assigned to the user, as well as the total count of pending items. These pending

items may include applications awaiting processing, unresolved complaints, inspections awaiting completion, or incident reports that require review. The specific items visible to a user on this page are determined by the types of records they have access to.



Example of an ArcHealth Task Dashboard Interface

From this page, users may view tasks assigned to them and monitor their progress in the workflow by clicking the 'View All' link on the respective card. Users can access detailed breakdowns of all pending items categorized by type, assignee, or workflow status, by clicking the corresponding links.

Example of the Tasks Assigned to Me Interface

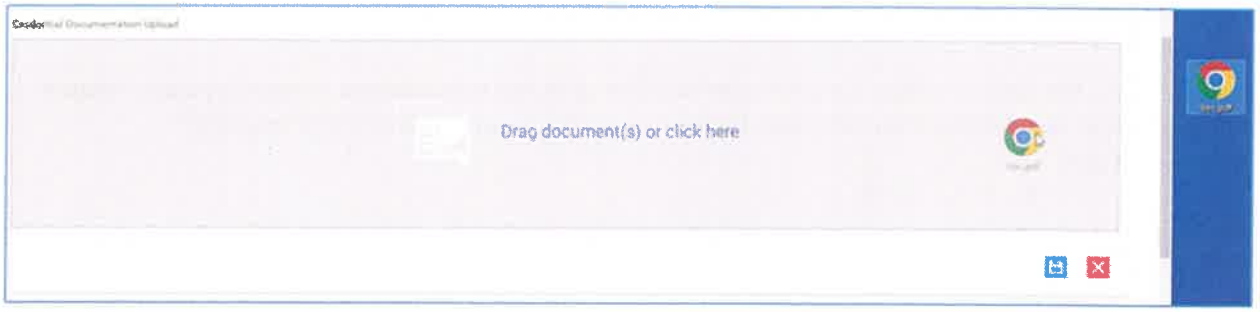
Example of the Tasks by Workflow Status Interface

Every count on the page is accessible through a clickable link. Selecting one of these links takes the user to a page detailing the individual applications included in that count. To further refine the displayed information, users have the option to use dropdown menus at the top of the page for filtering and sorting. Additionally, these lists can be exported to an Excel file for external use. For an in-depth review of a specific record, users can simply click on the record number link, which redirects them to the record's individual review page.

Example of the Task List Details Interface

5.8. Document Management

ArcHealth incorporates a robust document management system with integrated virus scanning capabilities. This system enables users to conveniently upload and associate documents and document metadata with records with a user-friendly "drop box" style interface.

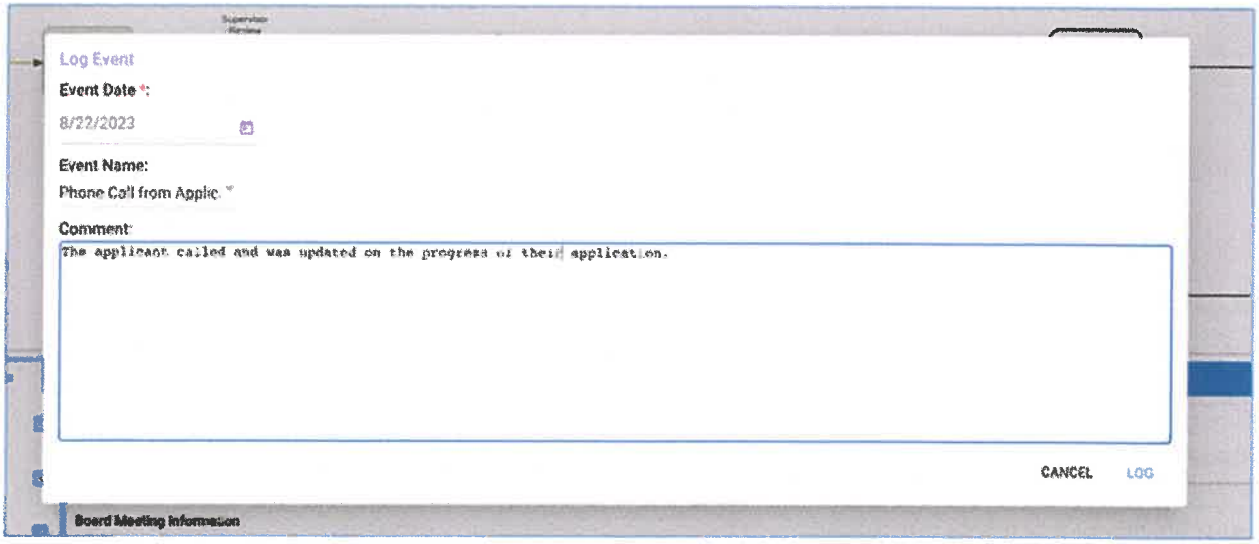


Example of Dragging a PDF into a Document Upload Field

ArcHealth also includes a document generation engine capable of generating PDF or Word documents and populating fields automatically from the database. Users have the flexibility to create PDF form templates using any PDF form editor and associate them to a specific record type. Additionally, the ArcHealth platform offers template-driven PDF export functionality for various purposes, including Licenses, Applications, Inspections, Complaints, Record Requests, Incident Reports, and more.

Logging Events

Authorized users can document events for any record type within the system. These events constitute a comprehensive history of all actions and notes pertinent to a record. Events may be either system-generated, arising from activities like application submission and workflow step completion, or they can be entered manually by users.



ArcHealth Application Event

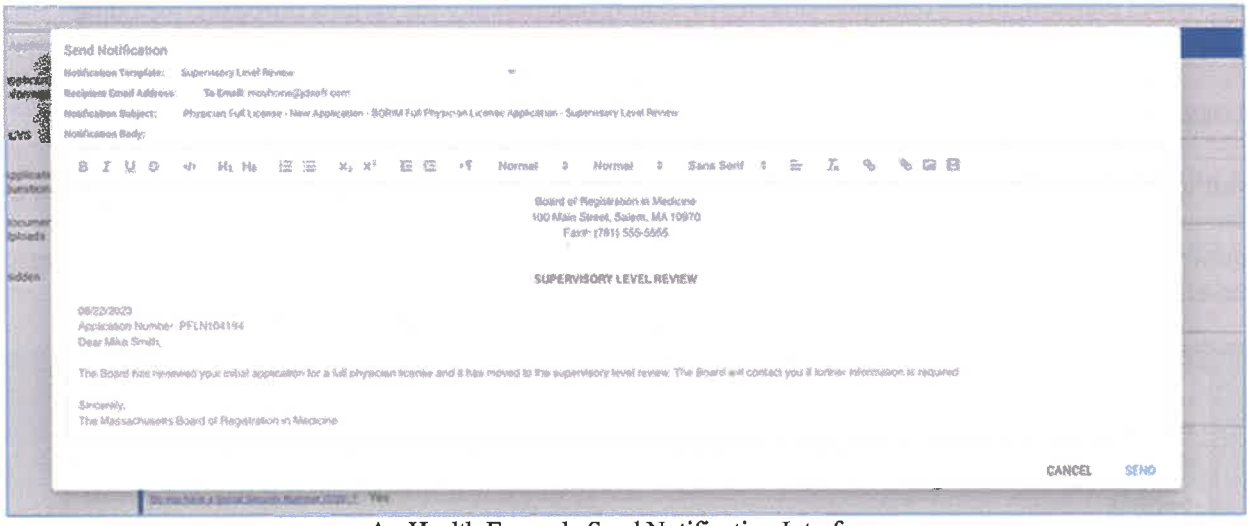
5.9. Sending Notifications

The system features an adaptable notification module, tailored to accommodate a broad spectrum of user requirements. It enables the generation of automatic notifications following various entity-related actions, such as approvals, submissions, and the completion of workflow steps. These notifications are designed to effectively reach diverse user categories, including Board Users, Investigative Staff, and License Applicants.

Furthermore, the system offers the convenience of on-demand notifications. It provides customizable templates that users can personalize and deploy as needed, ensuring timely and relevant communication.

The system is also equipped to send scheduled reminder emails at specific intervals, each customized for different entity types, such as license expirations to license holders. A key feature of this system is the ability to append generated PDF documents to emails, commonly used for sending license certificates as attachments on license approval and renewal emails.

For complete transparency and accountability, all notifications are meticulously documented within the associated record regardless of how they were generated. The figure below provides a detailed view of the on-demand 'Send Notification' interface.



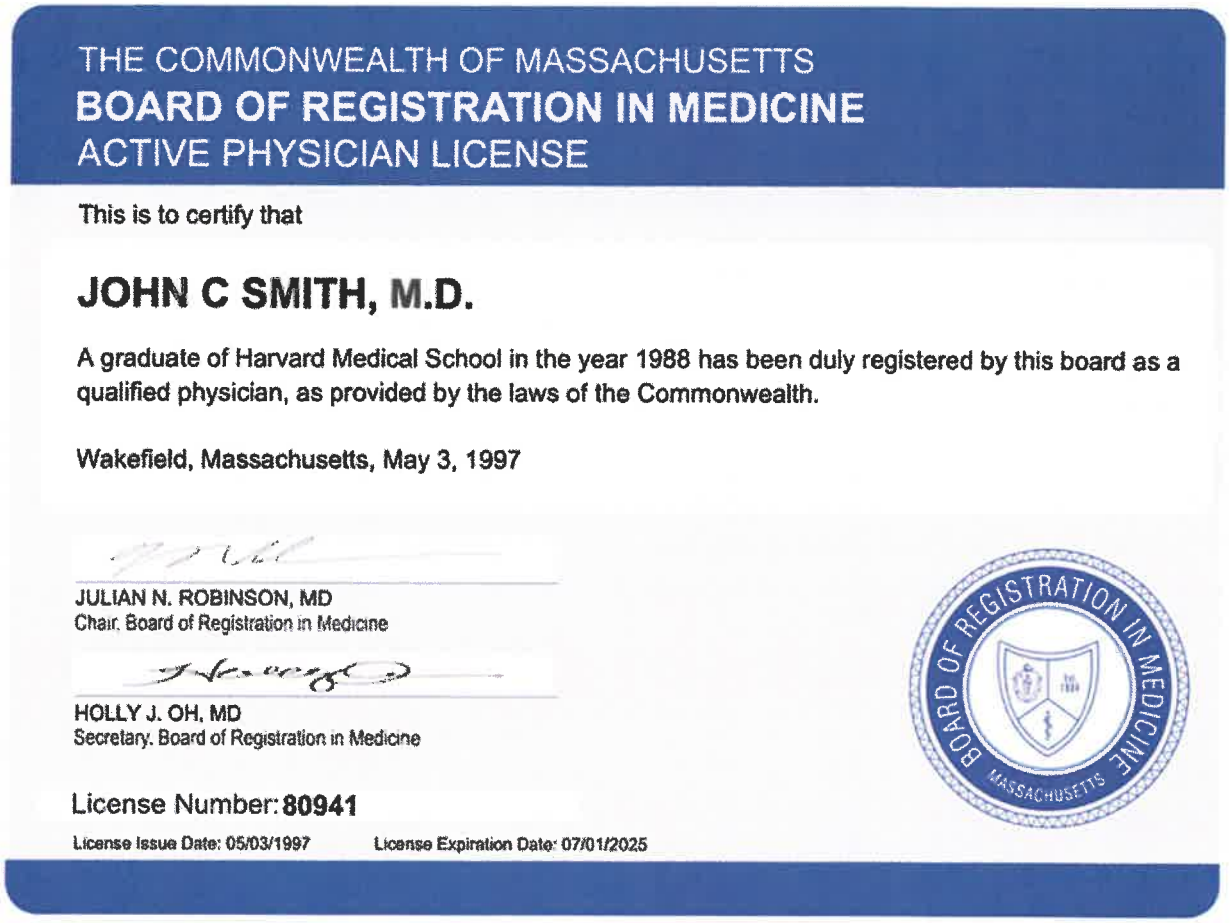
ArcHealth Example Send Notification Interface

5.10. Document Generation and PDF Support

ArcHealth is integrated with a sophisticated PDF engine capable of generating any type of PDF document, automatically populating form fields with data from the system database. To ensure flexibility, users can design PDF Form templates using any standard PDF form editor. Once created, these templates can be uploaded and linked to specific Entity Types within ArcHealth. For seamless integration and auto-filling by the system, it's essential that the PDF Form fields are named in alignment with ArcHealth's naming conventions.

Additionally, ArcHealth provides a built-in PDF export feature for a wide range of categories, such as Licenses, Applications, Complaints, Inspections, Record Requests, Incident Reports, and more. To

illustrate this functionality, an example of exporting a license certificate is shown in the figure below. Our commitment to client collaboration involves assisting in the development of these templates, ensuring they meet all necessary requirements for license certificates.



THE COMMONWEALTH OF MASSACHUSETTS
BOARD OF REGISTRATION IN MEDICINE
ACTIVE PHYSICIAN LICENSE

This is to certify that

JOHN C SMITH, M.D.

A graduate of Harvard Medical School in the year 1988 has been duly registered by this board as a qualified physician, as provided by the laws of the Commonwealth.

Wakefield, Massachusetts, May 3, 1997

JULIAN N. ROBINSON, MD
Chair, Board of Registration in Medicine

HOLLY J. OH, MD
Secretary, Board of Registration in Medicine

BOARD OF REGISTRATION IN MEDICINE
MASSACHUSETTS

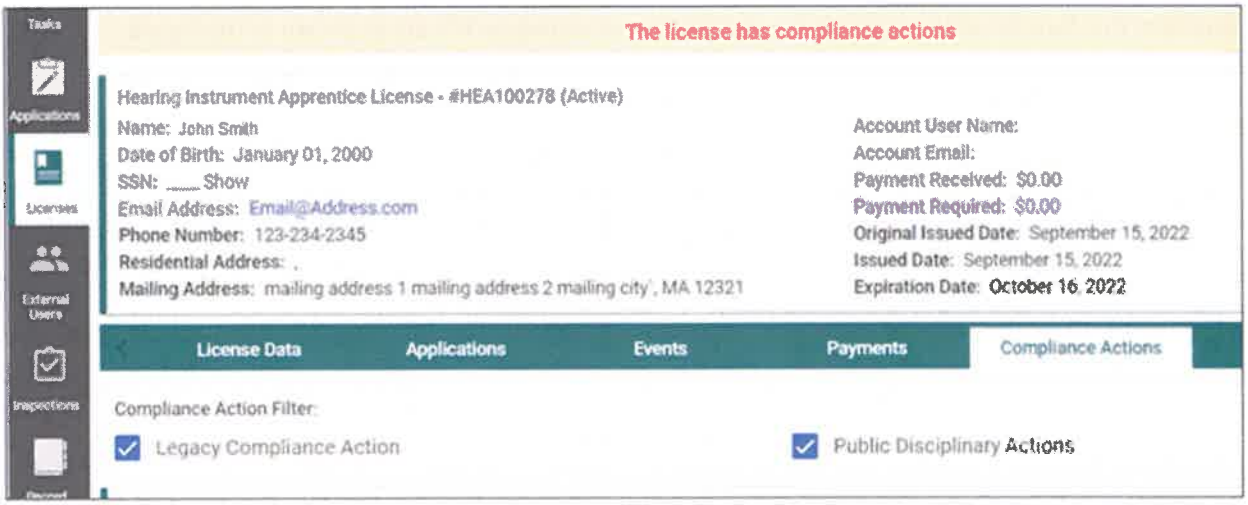
License Number: **80941**

License Issue Date: 05/03/1997 License Expiration Date: 07/01/2025

ArcHealth Example Generated License Certificate

5.11. Compliance, Disciplinary Actions, and Monitoring

The system supports configurable compliance action types, which can be either disciplinary or non-disciplinary in nature. These actions can be set to be publicly visible or hidden from the public view. If a license has any compliance actions associated with it, a banner will be displayed to alert internal users to this fact.

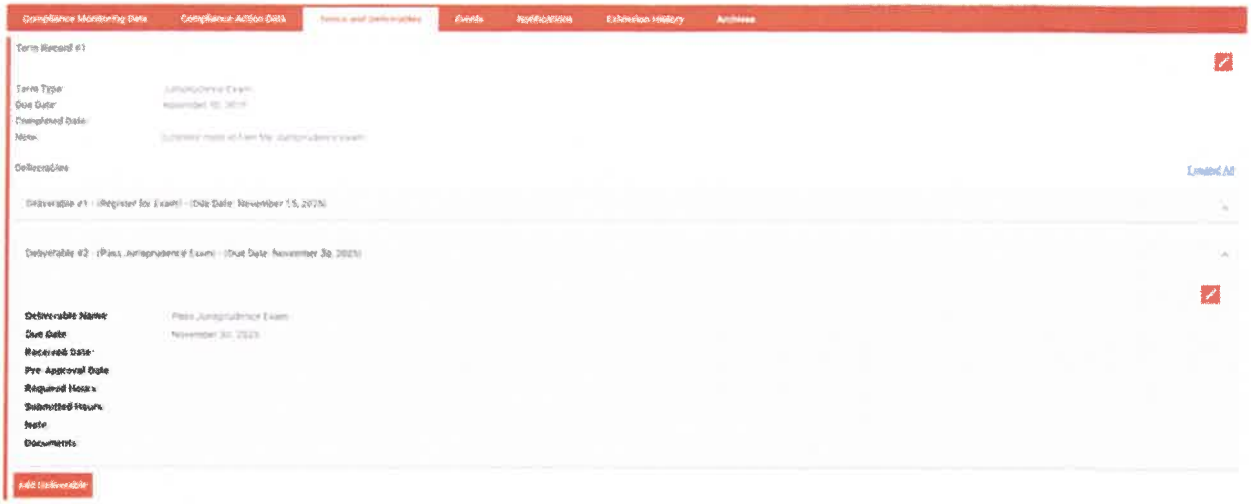


ArcHealth Example License with Compliance Actions

New compliance actions can easily be logged by selecting the "Log Compliance Action" option from the license action menu and filling in the required information. A visual demonstration of how to log a new compliance action is provided in the figure below.

ArcHealth Example Log Compliance Action

ArcHealth also supports the ongoing monitoring of certain disciplinary actions, like probation. The system allows agency users to add and track deliverables for successful completion of the monitoring program.



ArcHealth example of Compliance Monitoring Term

5.12. Reporting and Analytics

ArcHealth offers a robust reporting module providing the flexibility and user-friendly interfaces needed to ascertain insights into their community's licensees.

ArcHealth will simplify access to information collected by VDH, making data retrieval easy and efficient. Users can tailor report criteria, data sources, and security settings for a more detailed analysis of licensee data. In addition to meeting these specific requirements, ArcHealth provides user-friendly features such as keyword search for report retrieval and the ability to favorite specific reports. Users can export reports to different formats, including Excel, PDF, CSV, and Microsoft Word. The system supports document generation, allowing users to create customized reports and documents effortlessly. The figures below provide a visual representation of ArcHealth's reporting interface, demonstrating its user-friendly design and efficient report management.

Example Report List Interface

Example Report Interface

ArcHealth has a business intelligence module that supports ad-hoc/canned tabular reports, charts, and dashboards. It provides user-friendly interfaces for VDH users to analyze data and determine trends. The figure below displays an example of a Dashboard housing a number of different charts. Users may drag charts around the page, as well as resize them using simple drag and drop. Users can also set the sharing settings of each chart, so that it is private, shared with users in the same department, or shared with the public at large via the public open data portal.

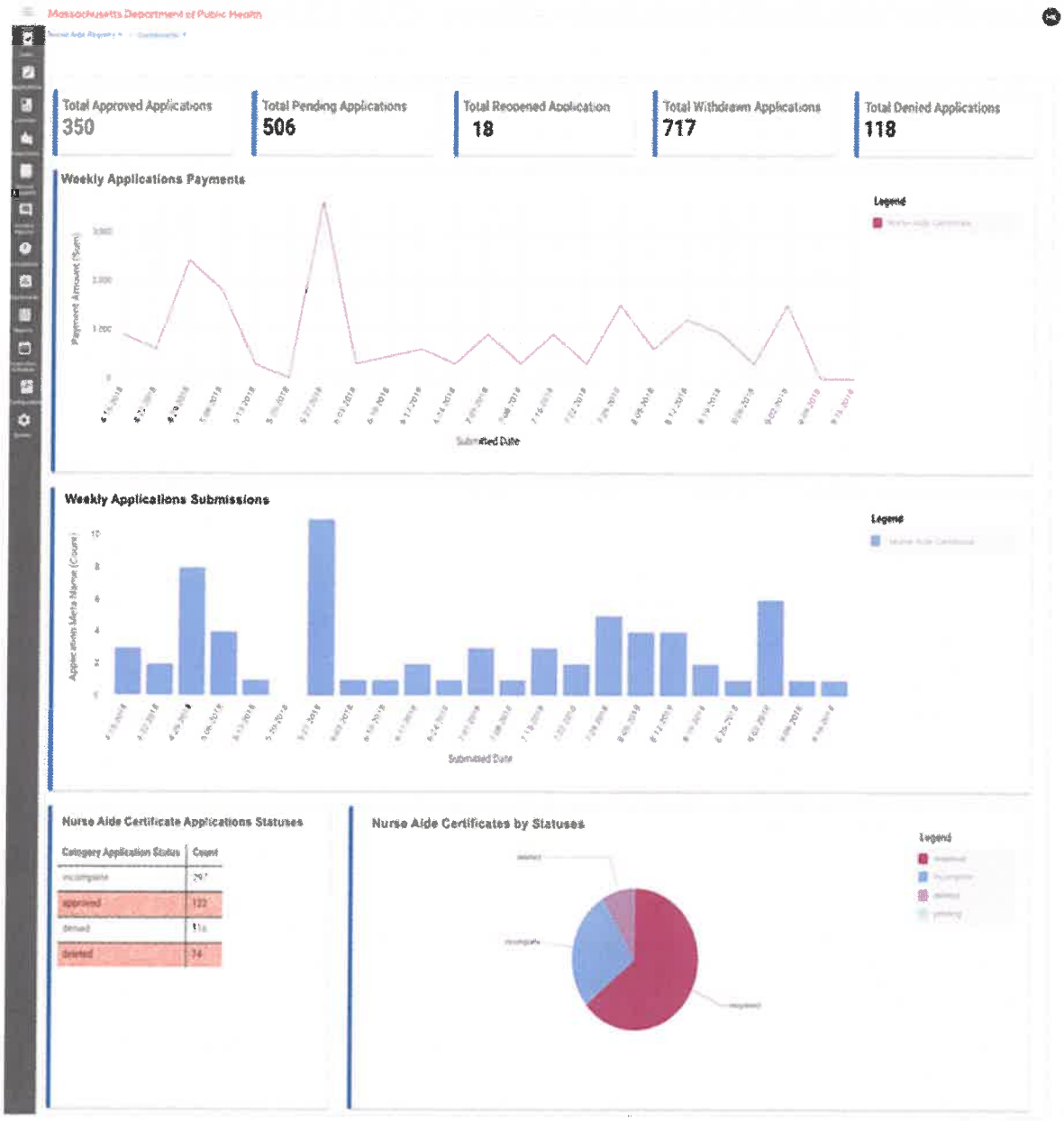


Figure 6: Example of an ArcHealth Dashboard

ArcHealth also provides easy-to-use canned/ad-hoc reporting interfaces. Users can specify the columns of the report, the criteria of data to be displayed, and the sharing settings of the report. The interface makes it simple and intuitive to create the exact report needed. Users will also be able to export reports into a variety of file formats, such as Excel and PDF. See the figure below for the reporting interface.

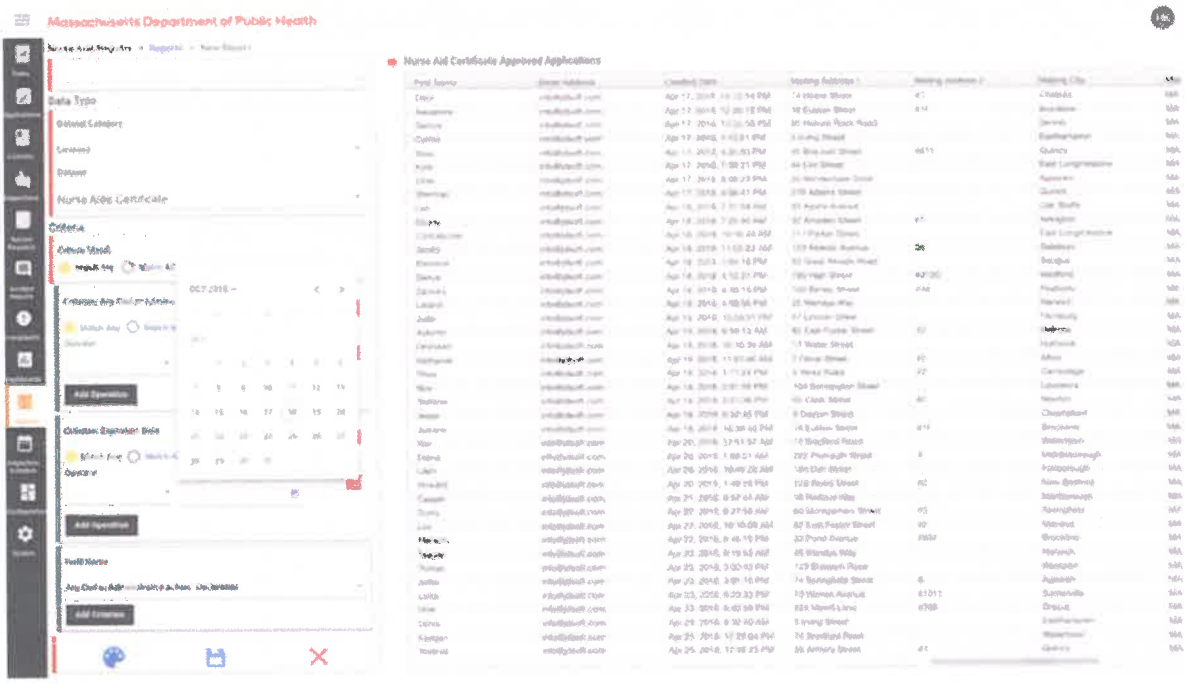
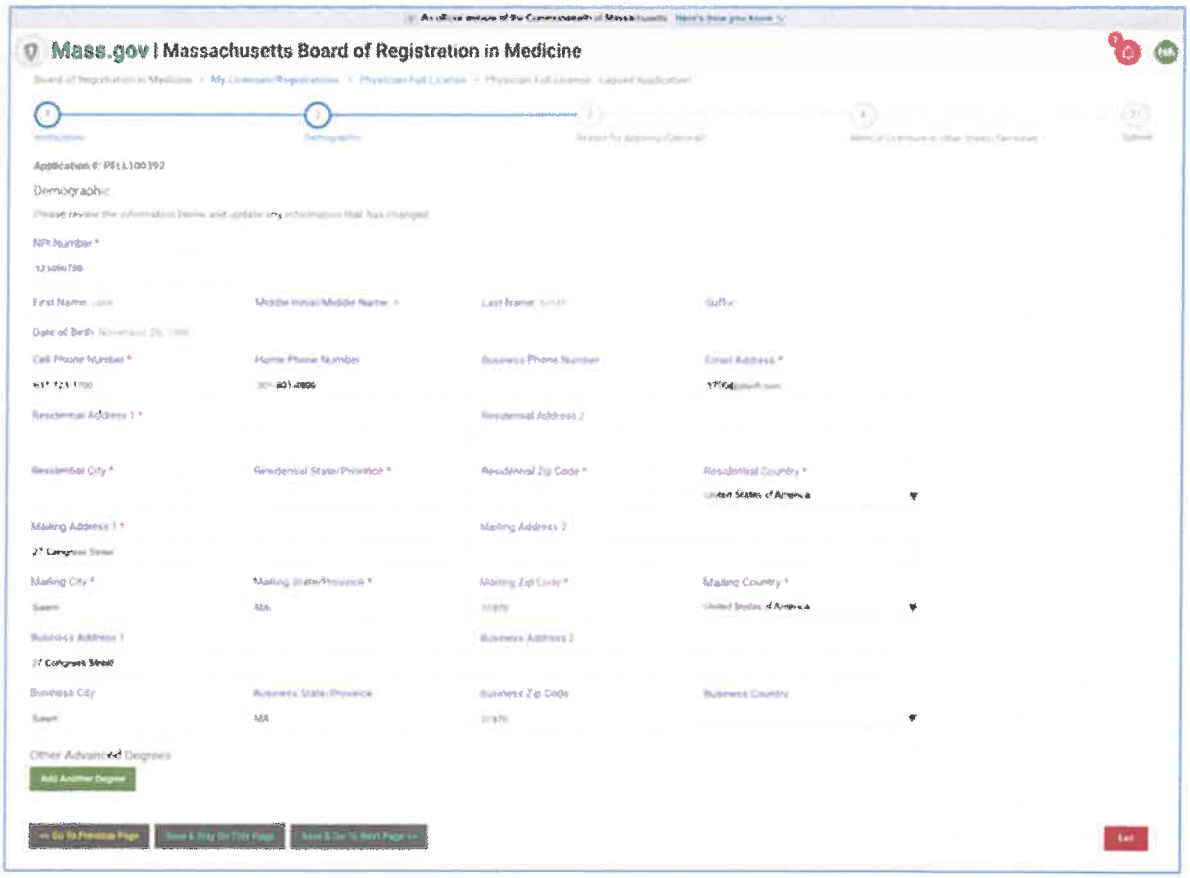


Figure 7: Example of an ArcHealth Ad-Hoc Tabular Report

5.13. Applying for a License

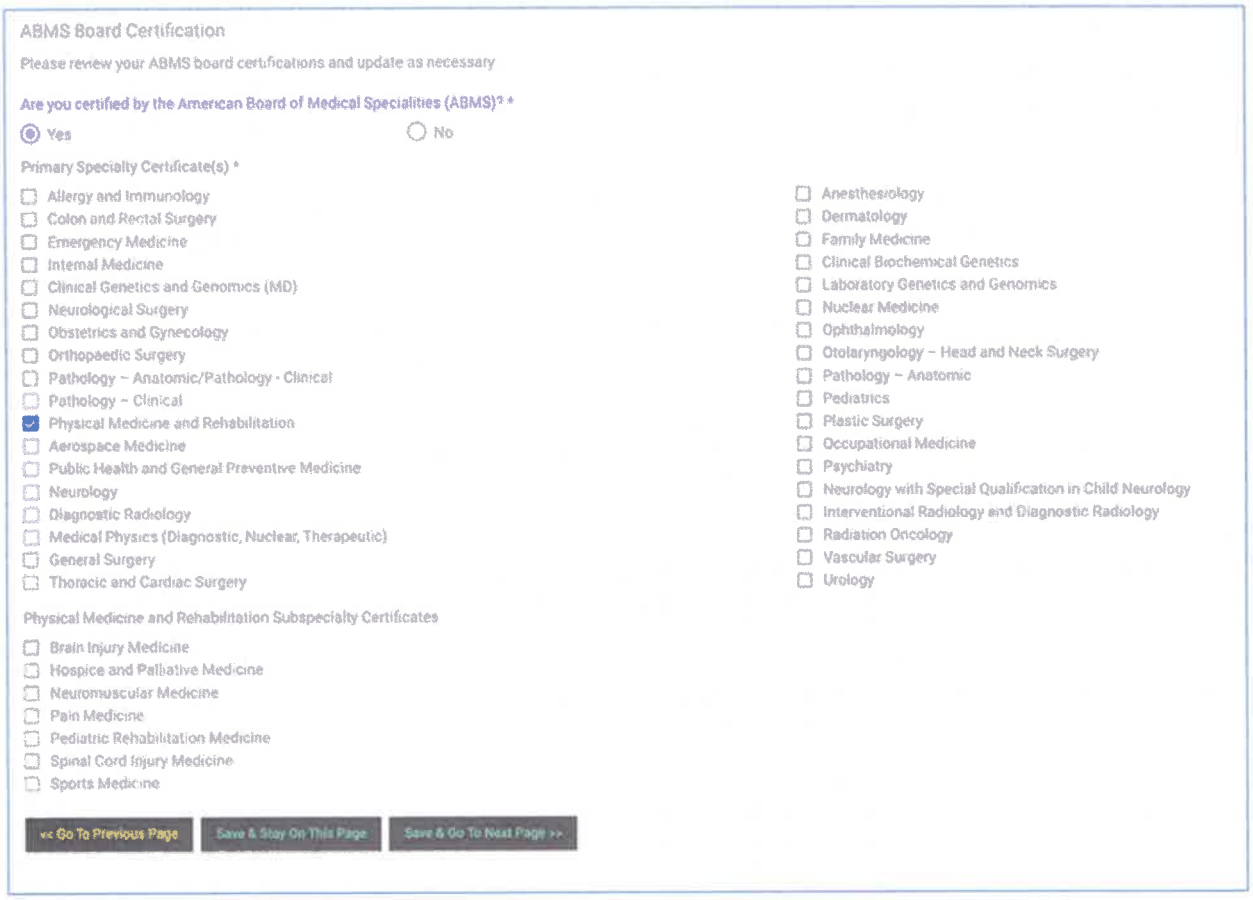
ArcHealth is designed to assist applicants at every step of the license application process, ensuring a smooth and user-friendly experience. Each page of the application features step-by-step instructions that guide the applicant through the necessary tasks, explaining what needs to be done and how to do it. This comprehensive guidance eliminates guesswork and provides clear direction, helping applicants to complete their submissions accurately and efficiently.

ArcHealth offers support for a diverse range of data fields, including text boxes, drop-downs, checkboxes, radio buttons, dates, document upload fields, electronic signatures, and more. Additionally, the system integrates with online payment options, enabling applicants to pay application fees via credit card. The specific layout of the payment interface may vary depending on the ePay vendor implementation. Presently, ArcHealth is integrated with nCourt and Stripe, two leading national ePay vendors. The configuration of fields on the application page, their organization into groups, and division into steps or pages is entirely customizable, allowing for tailored solutions on a per-application basis. Below are examples of application pages demonstrating the various possible field types.



ArcHealth Example Demographic Information Application Page

The system supports fields like radio buttons and check boxes with configurable lists of options as shown below.

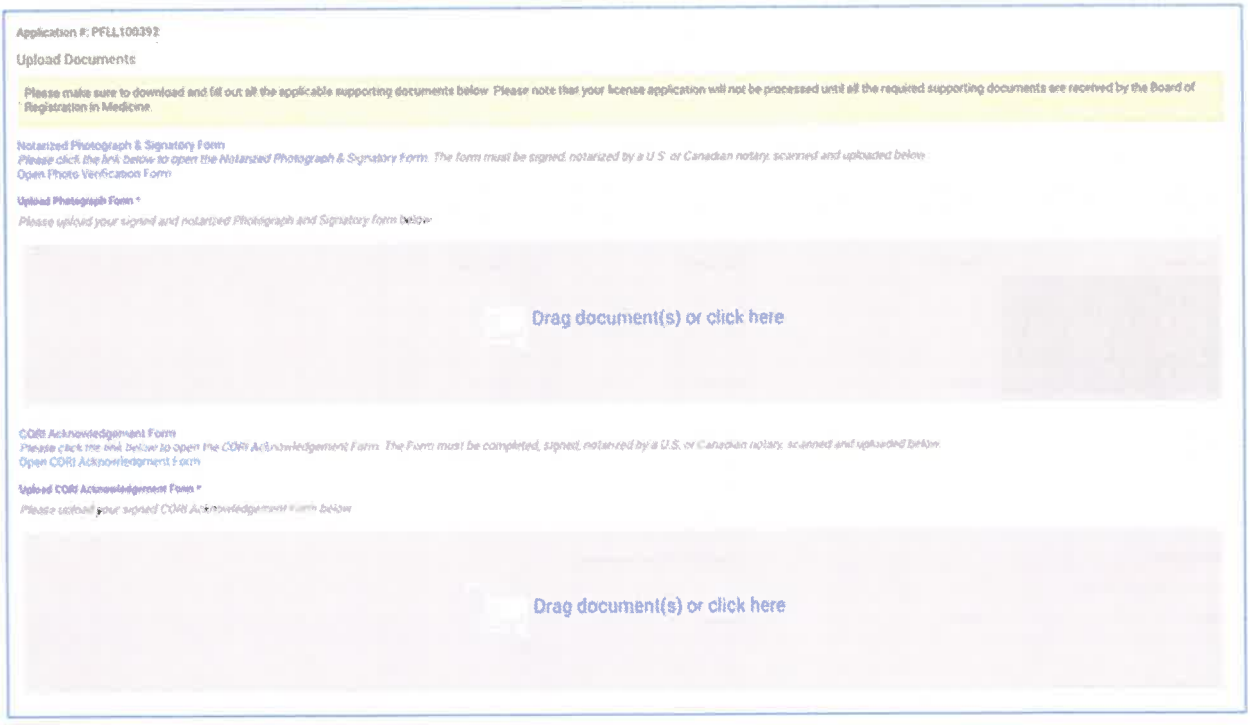


ArcHealth Example Radio Button and Checkboxes

The system also supports repetitive field groups, accommodating scenarios where multiple sets of the same information are required. These are groups of fields that the applicant can add as many times as necessary to supply the required information. By simply clicking the "Add Another..." button, users can effortlessly add more fields to the page, ensuring that the application can adapt to the unique needs and complexities of each individual case. This feature enhances the system's flexibility, making it even more user-friendly and responsive to varying application requirements.

ArcHealth Example Repetitive Field Groups

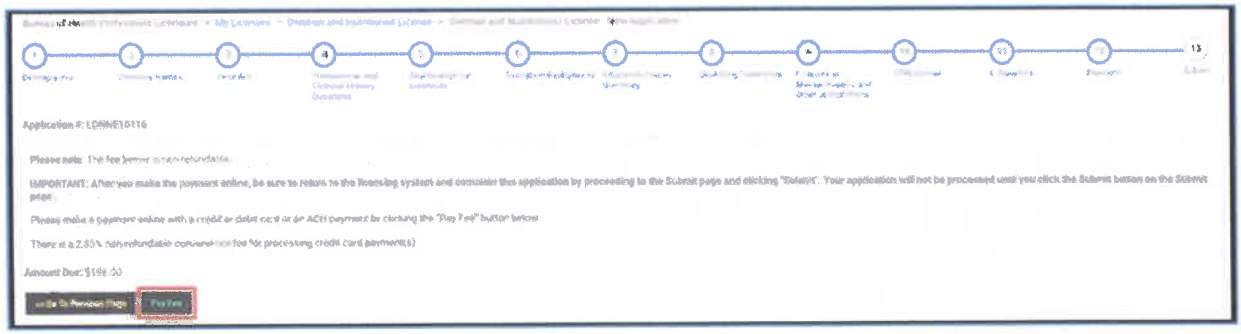
ArcHealth provides functionality for document generation and upload as part of the application process. Specific fields within the application can be set to generate forms, pre-filled with information that was entered earlier in the application. After completing these forms, applicants can upload them along with other necessary documents through document upload fields. These fields offer a simple drag-and-drop option or traditional file selection, depending on the user's preference. If multiple document types are expected, the upload fields can be configured to distinguish between different document types, helping users identify the required documents. The following figure illustrates the document upload interface within ArcHealth, demonstrating how applicants can interact with the fields to generate and upload the required documents.



ArcHealth Example Document Upload and Generation Fields

5.14. Electronic Payments

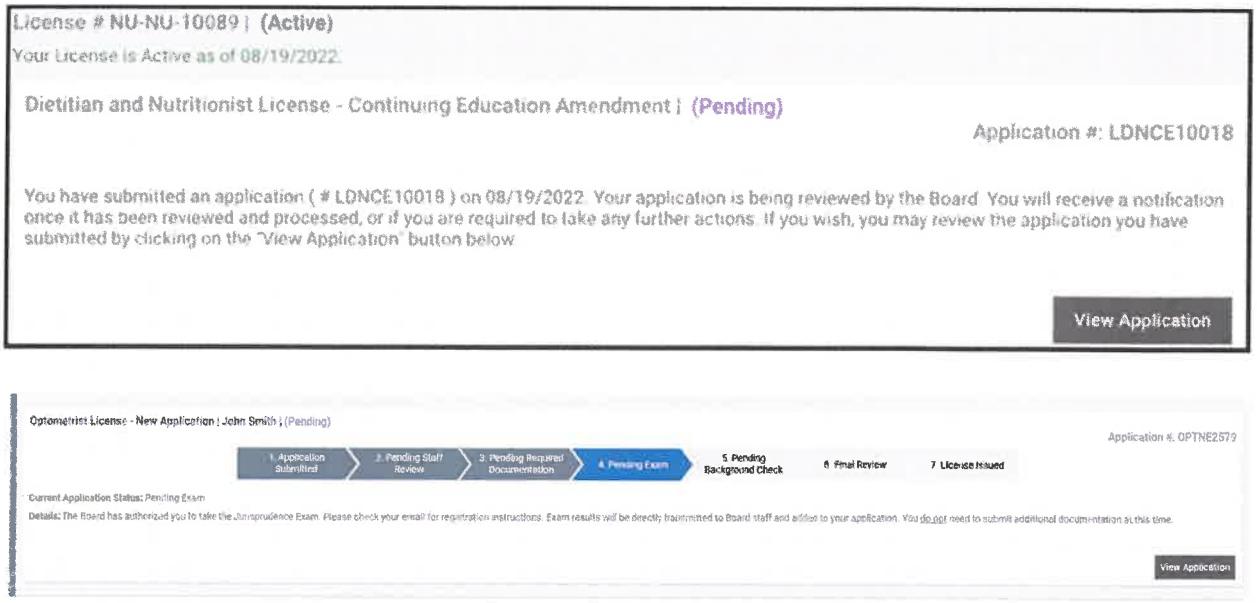
License applications within ArcHealth can be configured to require payment before submission, allowing for both straightforward flat fees and complex calculations. The fee structure can be determined by various factors, such as information provided within the application, or specific circumstances like the length of time a license expired during a reactivation process. This ensures that the payment process is aligned with the specific needs and rules of each application type. The screenshot below illustrates an example of the payment page.



ArcHealth Example Payment Page

5.15. License Application Tracking

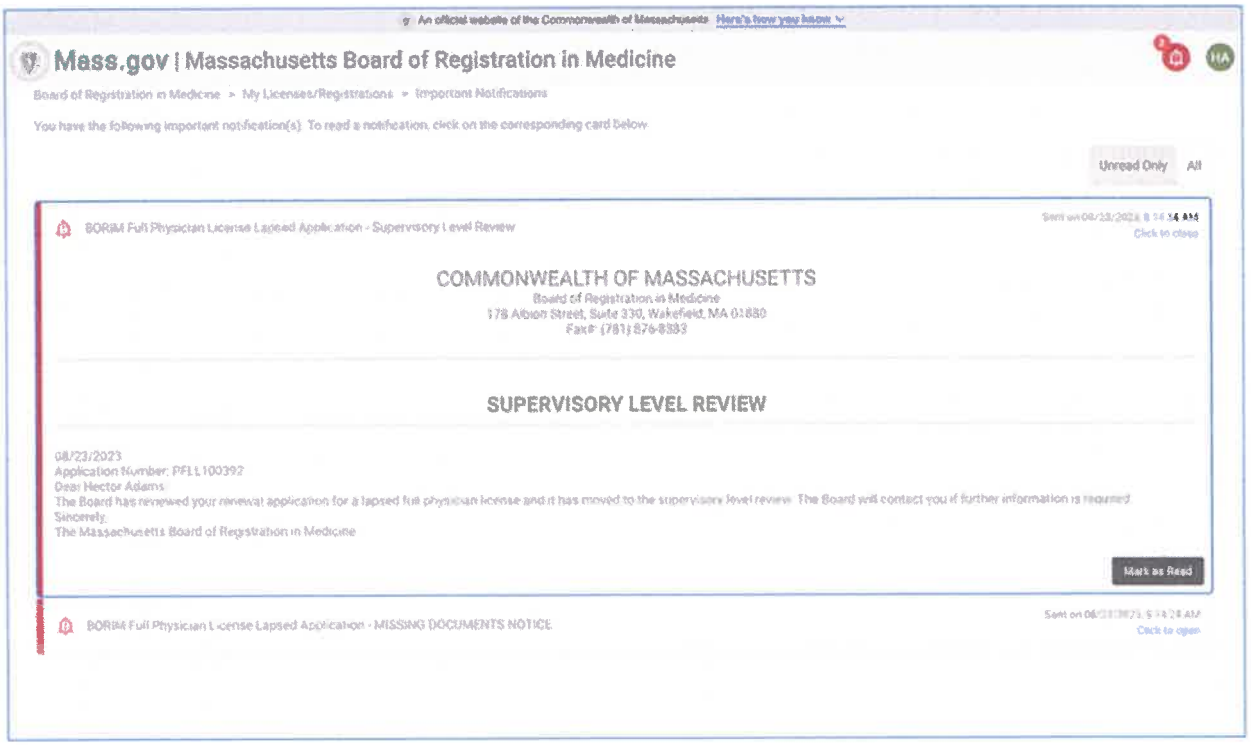
After applying for a license, applicants can monitor the status of their application at any time using the licensee module. The information displayed regarding their status can be as detailed or as simple as desired. On the more detailed side, the system can be configured to show each workflow step the application has completed, how many steps are remaining, and can include detailed explanations for each status to guide the applicant through the process. Applicants may also view and download a PDF containing the information they submitted for the application, including any uploaded documents. They will receive email notifications alerting them to any changes in application status, or any other pertinent information deemed necessary. Once licensed, the applicant is to view their license status and download a digital copy of their license certificate on-demand. The figure below illustrates the status display for an application that is currently pending, showing how the applicant can easily track the progress of their application through the system.



Example Pending Application Page

5.16. External Notifications

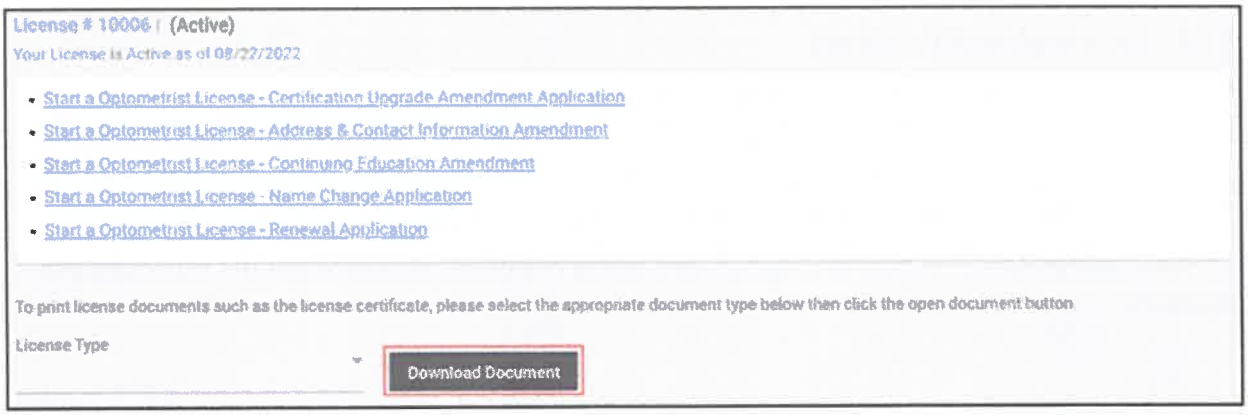
When notifications are sent to an applicant, they are received via email, and the applicant can also view these notifications in the Licensee Portal. Notification templates can be configured to only display the contents of the message within the portal. If a user has unread messages, they will be directed straight to their notifications upon logging in. Applicants are required to mark notifications as 'read' before continuing with other tasks within the Licensee Portal. This ensures that important information is acknowledged and helps in maintaining clear and secure communication between the applicants and the Board.



Example Notifications Page

5.17. On-Demand Document Generation

Once a user is licensed, they will have the ability to generate a configurable set of documents from their records. This may include items such as their license certificate, or PDF copies of past applications. The ability to access these documents on demand enhances the user's experience and ensures that they have ready access to vital records related to their licensing status. The screen capture below provides a visual representation of the interface that licensed users utilize to generate and access various documents such as their license certificate or PDFs of past applications.

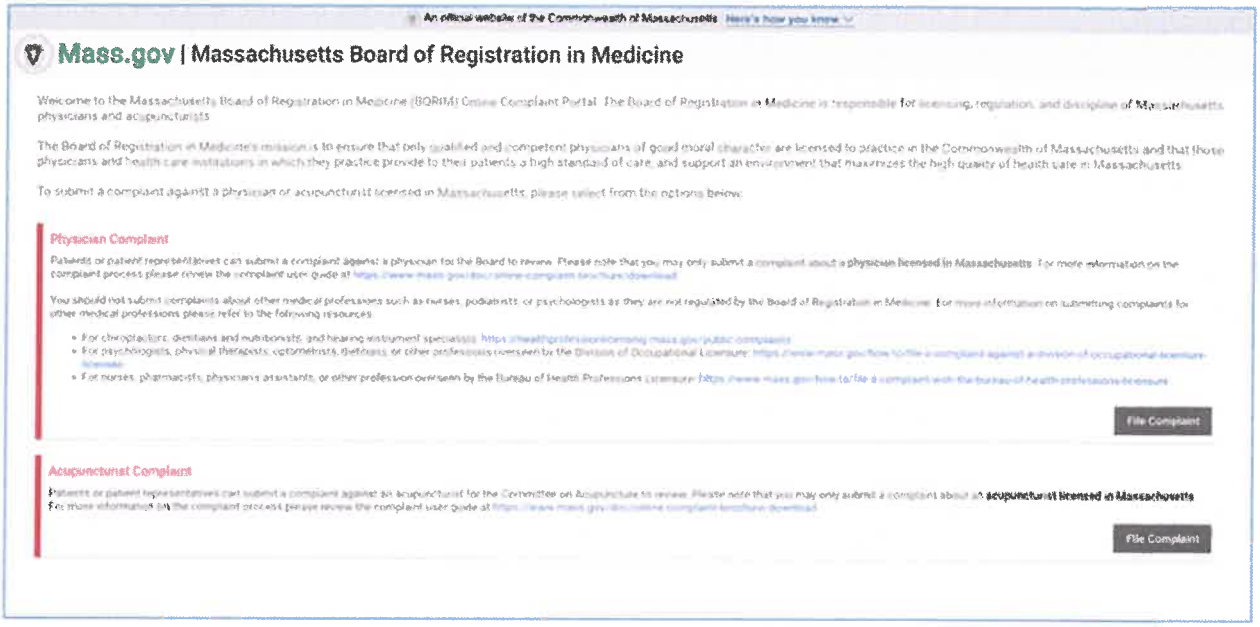


ArcHealth Example Licensee Landing Page

5.18. Submitting a Complaint

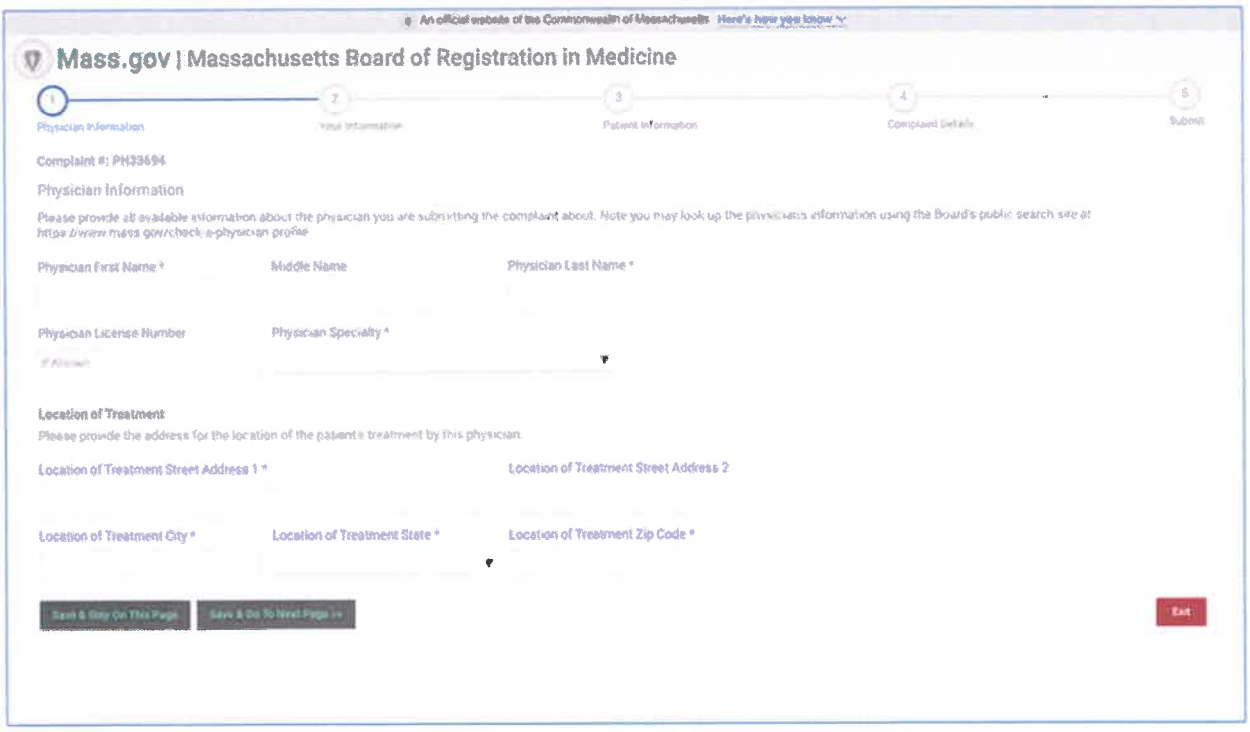
ArcHealth includes an external complaint submission portal, enabling the public to file complaints against a licensee either anonymously, or with personal identification.

The system can be configured to either provide one generic complaint type or to offer different complaint types tailored to various health professions. The screenshot below illustrates the interface for selecting the specific complaint type:

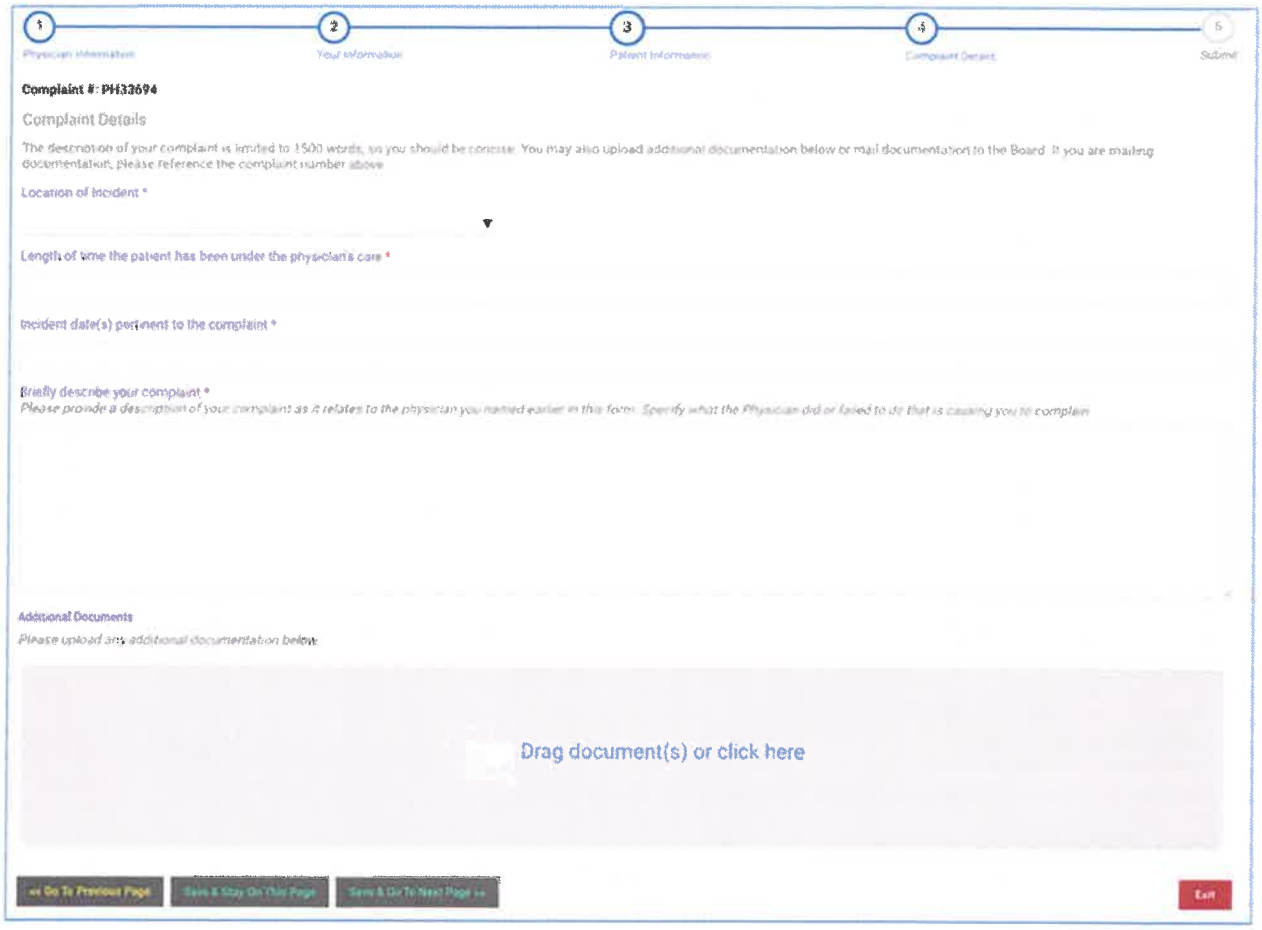


ArcHealth Example Compliant Selection Page

Complaints within the ArcHealth system can be configured with different field types, mirroring the flexibility found in license applications. Complaint forms support a wide array of data fields such as text boxes, drop-downs, checkboxes, radio buttons, dates, document uploads, electronic signatures, and more. This similarity in structure ensures that the system can collect all the necessary information, following a user-friendly approach consistent with other processes within the platform. The configuration of these fields, along with their organization and division, can be entirely customized to suit specific needs, just as with the license application pages. Below are examples of complaint pages demonstrating the various possible field types.



ArcHealth Example Complaint Data Collection Page



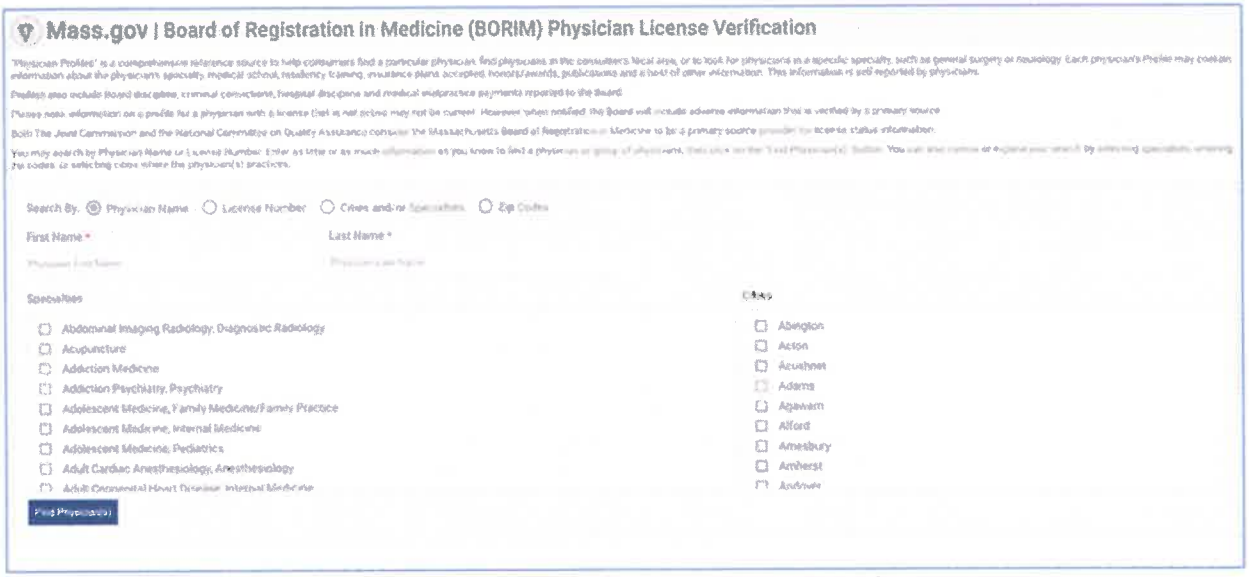
ArcHealth Example Complaint Details Page

Once a complaint is submitted, the complaint will enter a pending queue to be processed by enforcement staff.

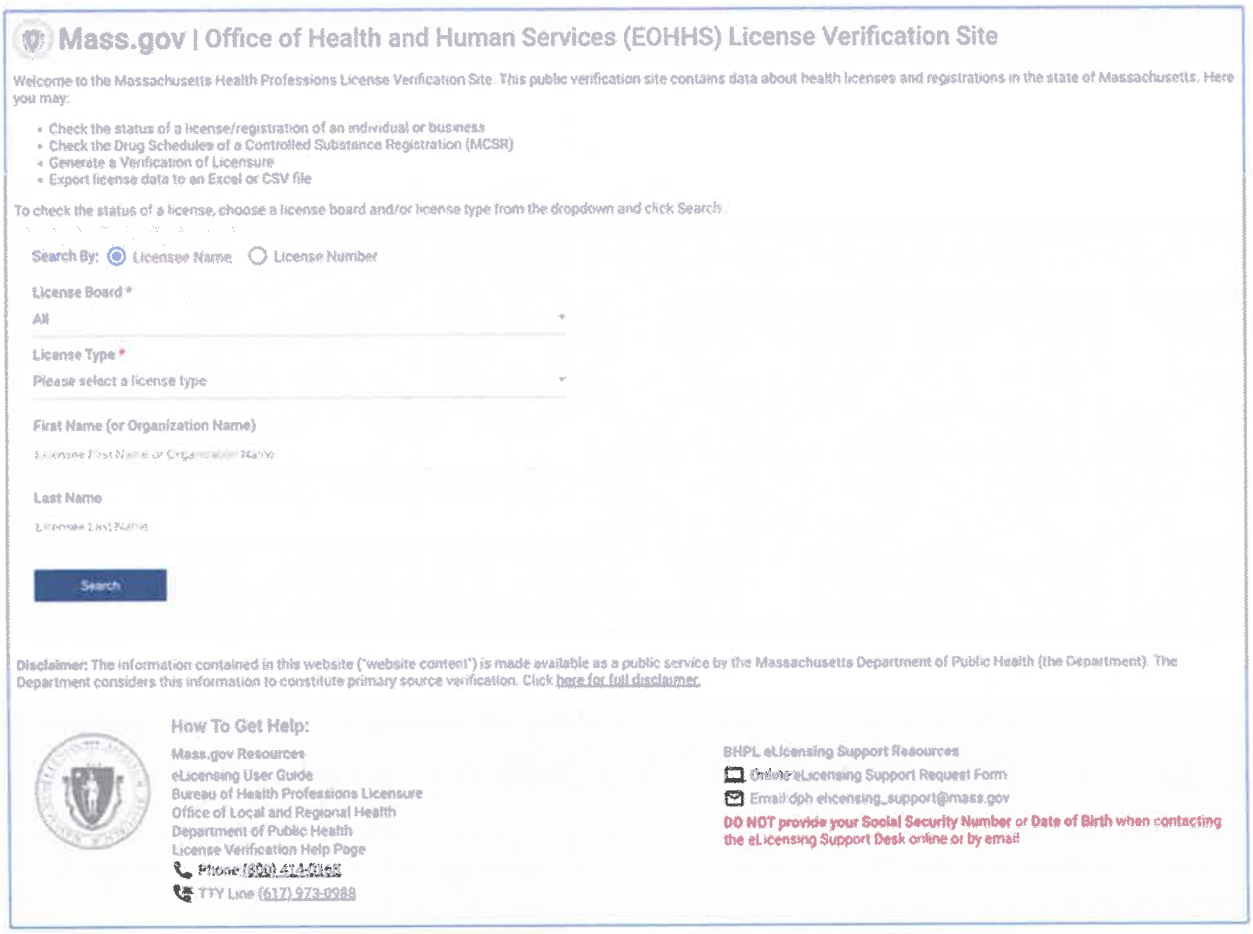
5.19. Public License Lookup

The Public module provides interfaces for the general public to view license data. Public users may search for licenses and view details on their licenses, such as disciplinary action and license status. We know that each agency has varied requirements regarding the information they display publicly and how the user community needs to be able to search for licensees. We will work with WVBOM to configure the data elements exposed on the public site to meet their needs.

Individuals can search for publicly available licenses using an easy Google style search as shown below. The search fields are configurable, but a typical search on the public site would be by licensee name, license number or city.



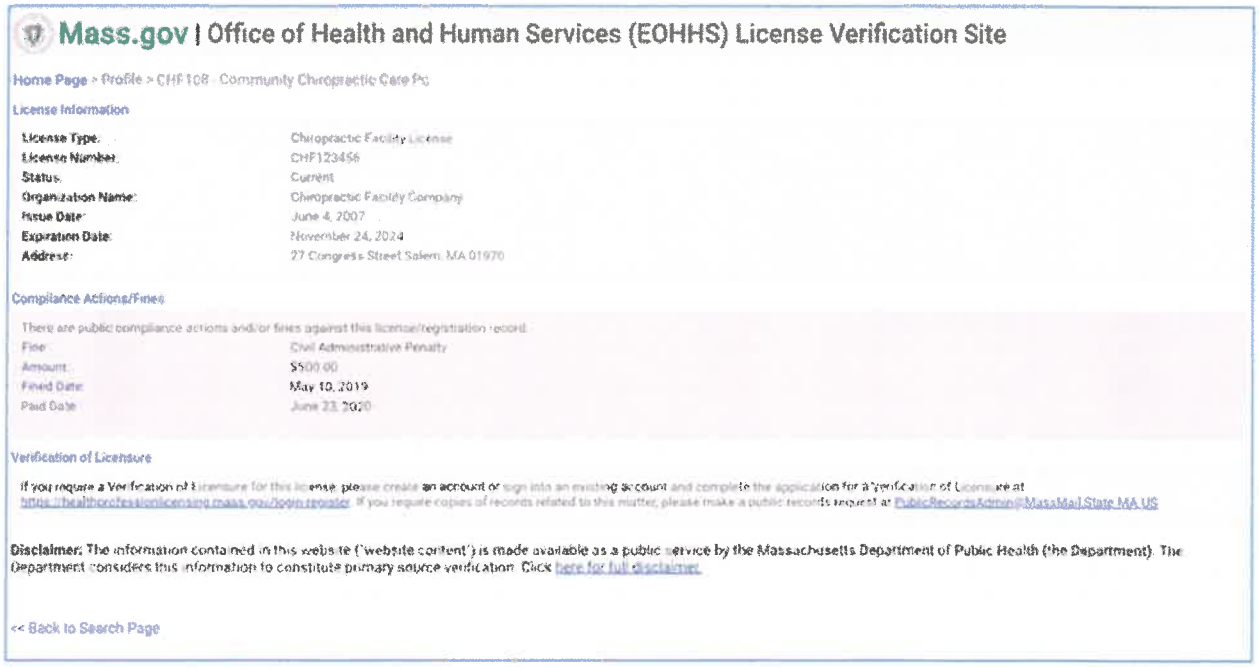
Example ArcHealth Physician Public Search Interface



ArcHealth Example of MA HPL Public Search Interface

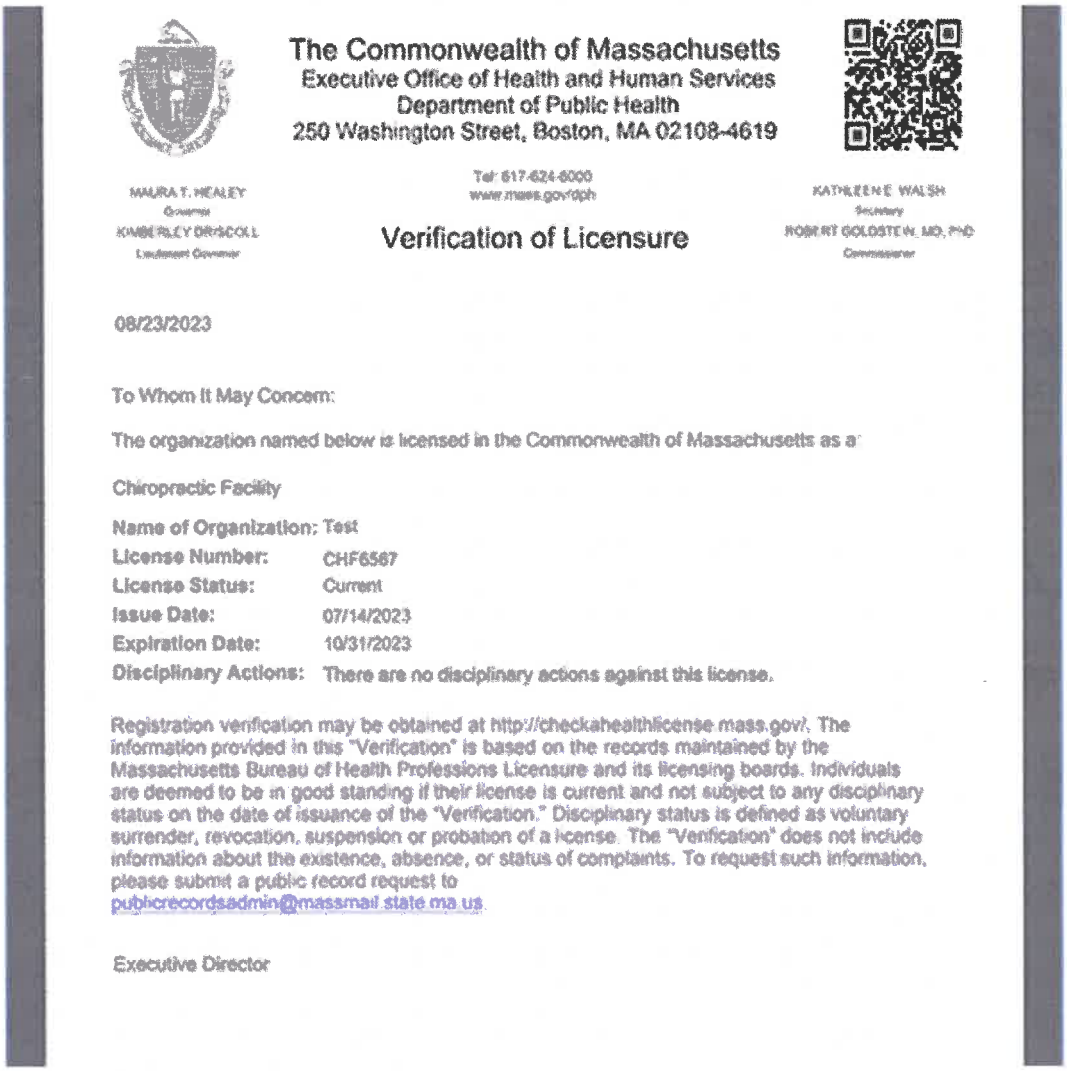
As stated above, we can configure the public portal to show whichever data fields WVBOM needs. Please see the example below of a license without disciplinary action and one with disciplinary action.

ArcHealth Example of public details without discipline



ArcHealth Example of public details with discipline

The system can also be configured to allow the public to generate a license verification certificate from the license details page. Users can simply click the "Generate Verification of Licensure" button (see screenshot above). And the system will generate a license verification document.



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Department of Public Health
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MAURA T. HEALEY
Governor
KIMBERLEY DRISCOLL
Lieutenant Governor

KATHLEEN E. WALSH
Secretary
ROBERT GOLDSTEIN, MD, PhD
Commissioner

Verification of Licensure

08/23/2023

To Whom It May Concern:

The organization named below is licensed in the Commonwealth of Massachusetts as a

Chiropractic Facility

Name of Organization: Test
License Number: CHF6567
License Status: Current
Issue Date: 07/14/2023
Expiration Date: 10/31/2023
Disciplinary Actions: There are no disciplinary actions against this license.

Registration verification may be obtained at http://checkahealthlicense.mass.gov/. The information provided in this "Verification" is based on the records maintained by the Massachusetts Bureau of Health Professions Licensure and its licensing boards. Individuals are deemed to be in good standing if their license is current and not subject to any disciplinary status on the date of issuance of the "Verification." Disciplinary status is defined as voluntary surrender, revocation, suspension or probation of a license. The "Verification" does not include information about the existence, absence, or status of complaints. To request such information, please submit a public record request to publicrecordsadmin@massmail.state.ma.us.

Executive Director

ArcHealth Example of Publicly Generated License Verification

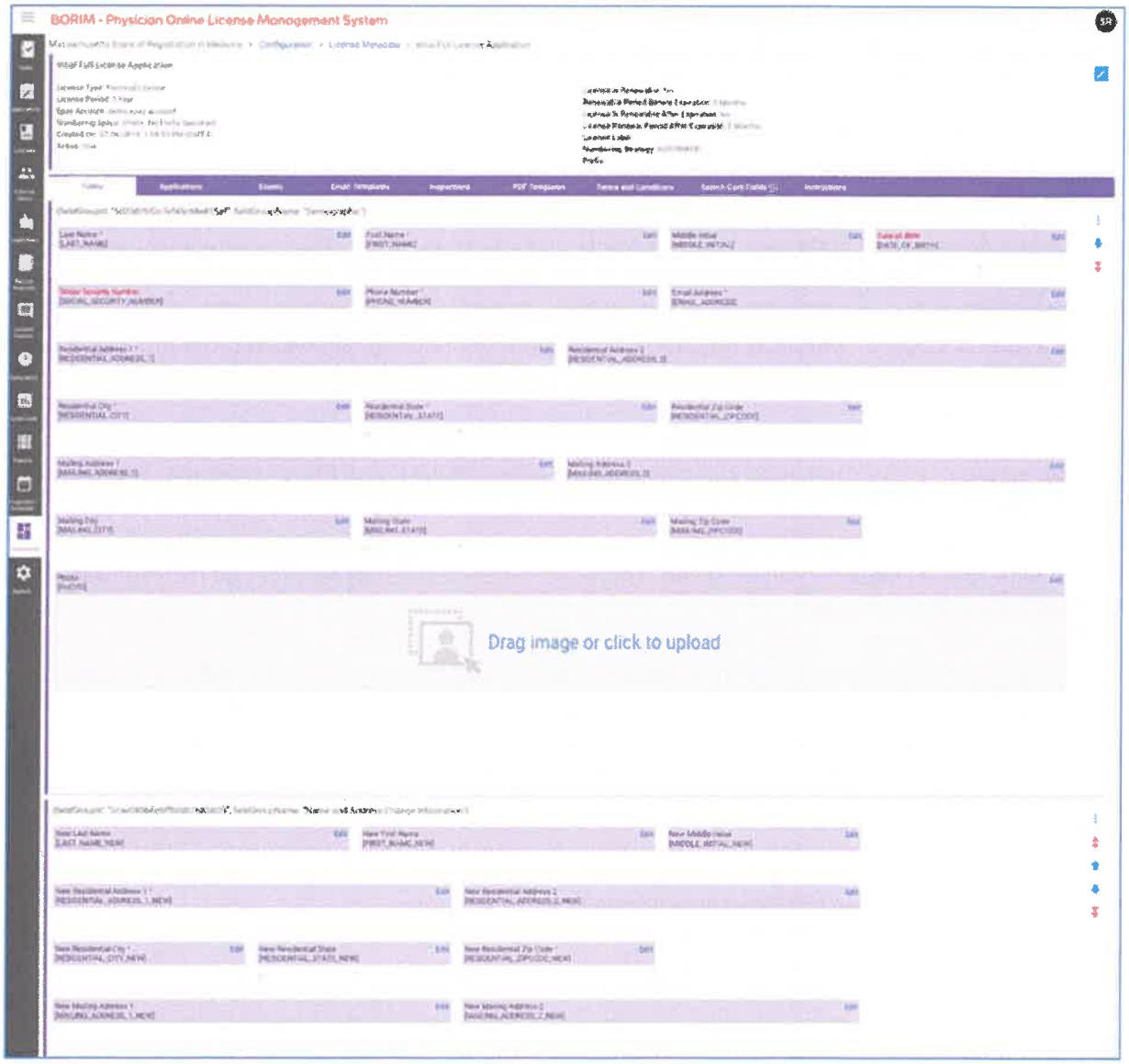
5.20. System Configuration - Structured Data Collection

The ArcHealth system provides authorized users with interfaces for designing data elements tailored to their specific requirements across various entities, including applications, licenses, complaints, inspections, record requests, and incident reports, etc. ArcHealth's web interfaces offer convenient drag-and-drop functionality for seamless customization, allowing users to efficiently manage the following aspects:

- Add, update, and delete fields.
- Modify validation rules and layout for each entity (supporting 20 different field types).
- Adjust field layout on pages (position, width, and height).
- Organize forms into multiple pages.
- Manage instructions and attestations on application pages.

- Manage allowed document types (size, file type) and configure document categories.
- Manage email templates used for notifications (e.g., application submitted, denied, approved).
- Manage photo settings (size, file type, resolution, etc.).
- Manage Event types (important note types recorded on an entity).
- Customize PDF templates for document generation.

A sample license entity configuration page, illustrating the complete customizability of each field, is displayed in the screenshots below.



Field Management Administration Interface

Field Edit Interface

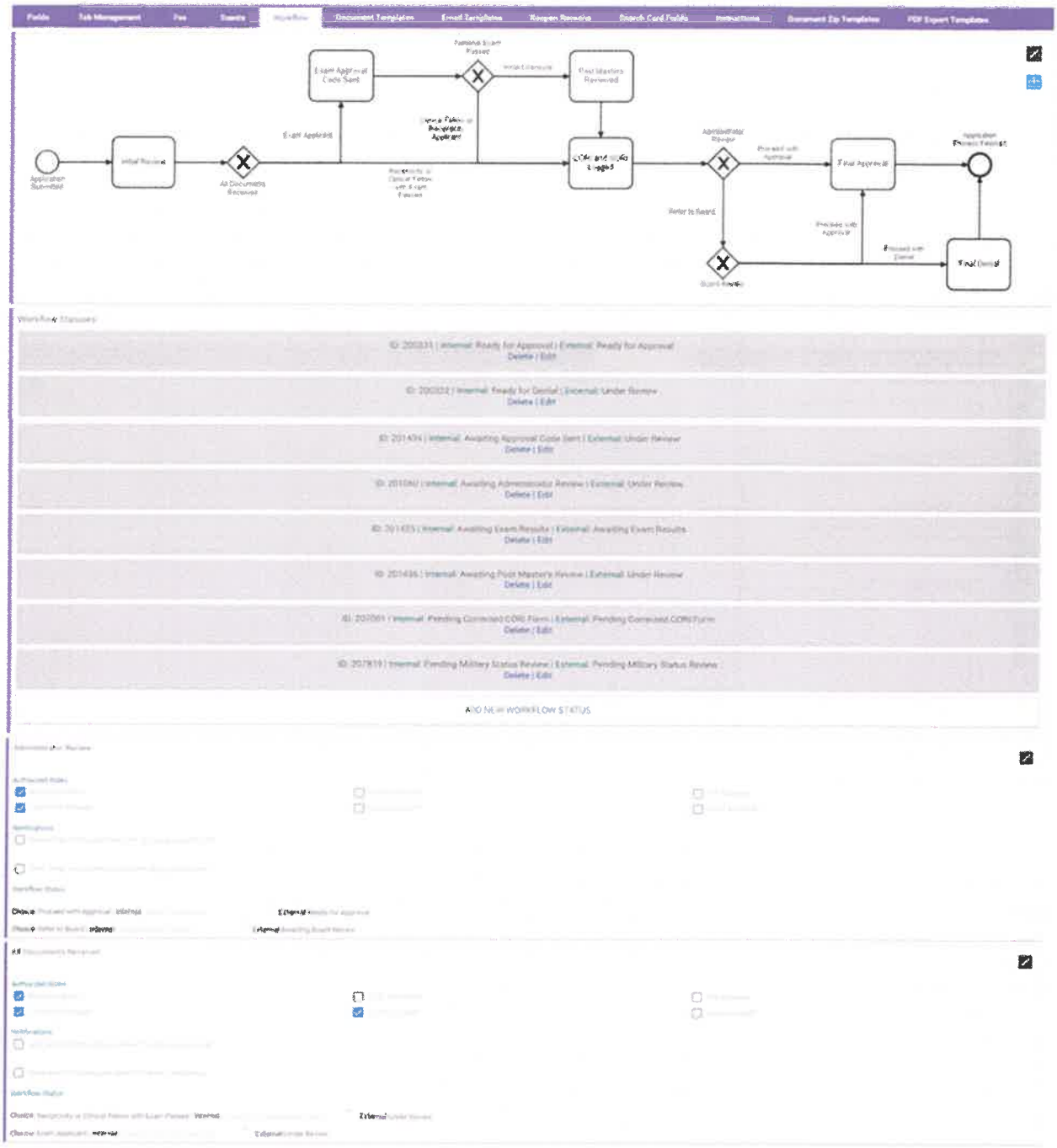
5.21. System Configuration - Workflows

In collaboration with WVBOM, JD Software will facilitate the initial setup of workflow diagrams in ArcHealth. However, ArcHealth's functionality extends beyond initial setup with its integrated workflow editor, a tool designed for authorized staff to create and adjust workflow diagrams for each type of entity (individual entity types for example different license applications can have different workflows). This editor, featuring a user-friendly graphical interface, is both intuitive and powerful, enabling staff to cater to a diverse range of workflow requirements without the need for advanced programming skills or modifications to the code.

The integrated workflow graphical interface, as shown in the figure below, simplifies the process of workflow creation. Authorized users can conveniently drag and drop task blocks from the sidebar into the workflow area. This facilitates the addition and arrangement of tasks within the workflow diagram, allowing for a clear visualization and organization of task sequences. After aligning the workflow diagram with specific needs, it can be saved. The system then seamlessly enforces all the established workflow rules autonomously.

Additionally, ArcHealth incorporates vital security features within its workflow management system. This includes the ability for users to define which roles are authorized to perform certain workflow tasks. By selecting or deselecting specific checkboxes, control over who can complete each workflow step during the application process is maintained, ensuring that only authorized personnel can perform these tasks. This feature is exemplified in the figure below, demonstrating the system's secure and efficient workflow management.

Below are images of ArcHealth's Workflow Administration Interface.



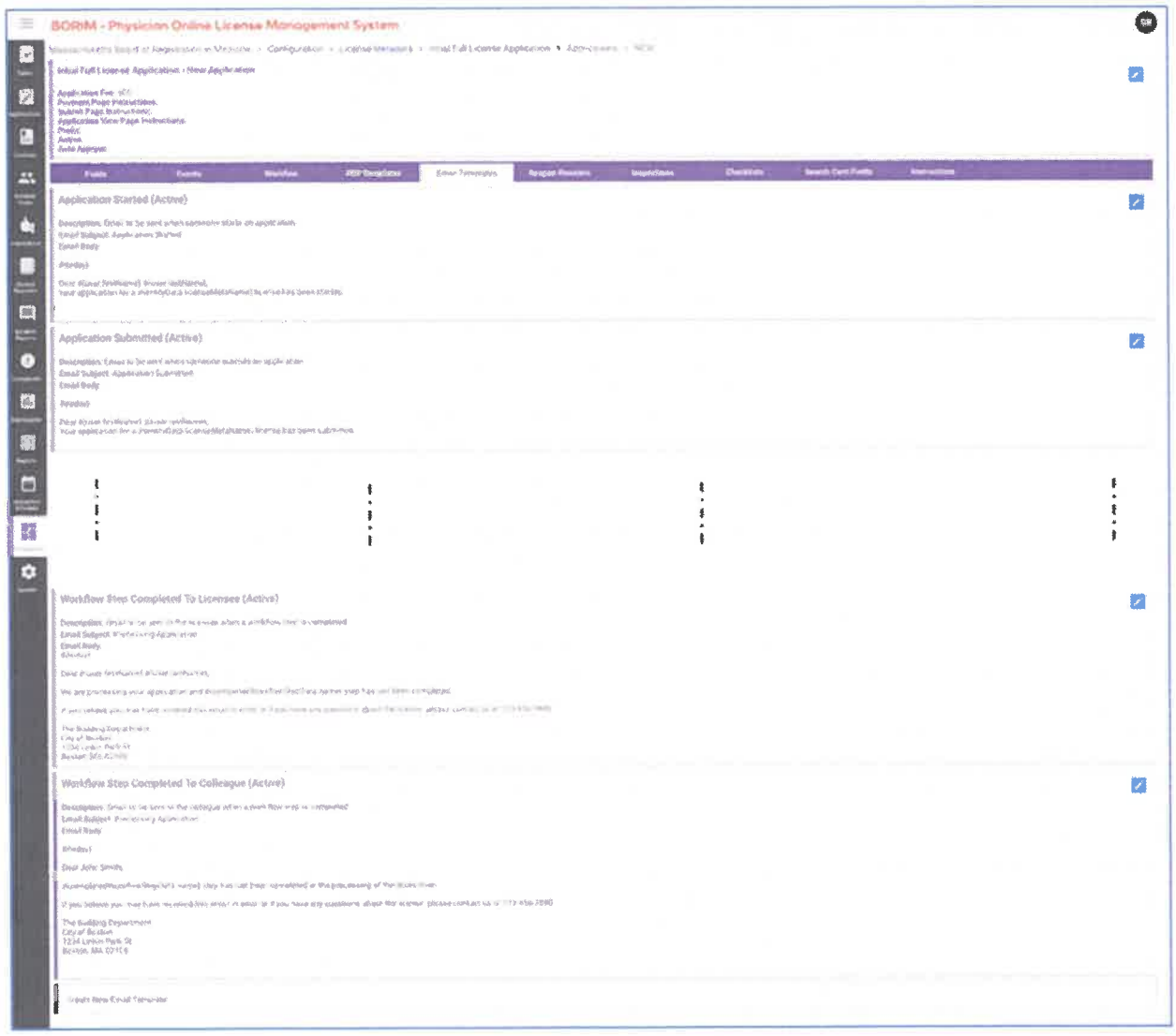
ArcHealth Workflow Administration Interface

5.22. System Configuration - Notification Templates

Users have the ability to customize the ArcHealth system to send email notifications in response to changes in an entity status or workflow. The system provides user-friendly interfaces for editing email notification templates, as shown in the figure below. This interface operates like a typical word processor, simplifying the process of tailoring email templates to meet specific needs. When sending

emails, ArcHealth efficiently replaces data placeholders in these templates with data from the entity record such as the recipient's name, license number, and approval date.

In addition, ArcHealth offers the capability to set up reminder notification emails. For example, users can configure these email templates and schedule them to be sent at predetermined intervals leading up to the expiration date of a license, for example.



ArcHealth Email Template Editor Interface

5.23. System Configuration – Security and User Administration

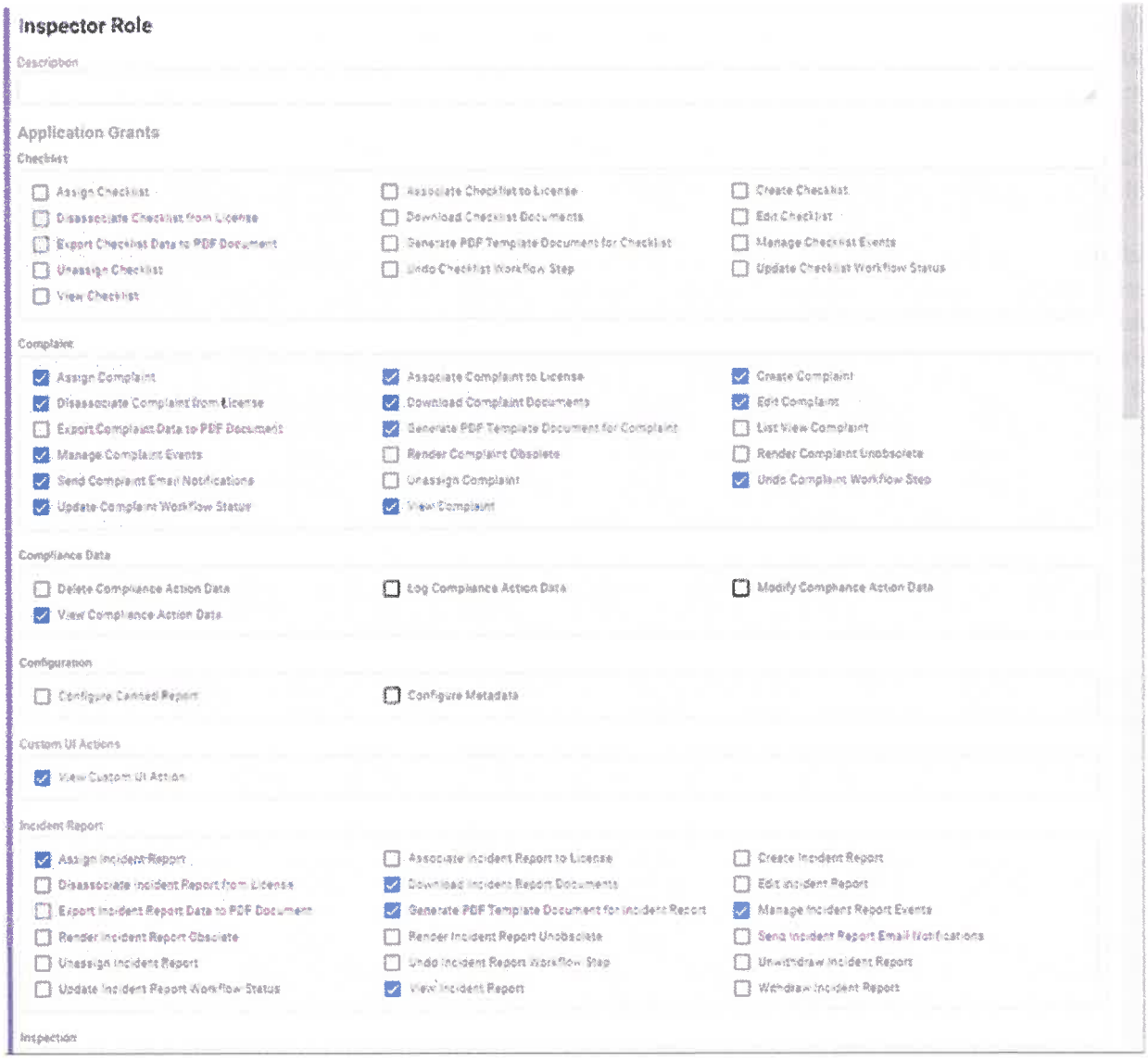
ArcHealth provides system administrators with the capability to fine-tune user access using intuitive user interfaces, streamlining the management of both user and system security settings within the application. While JD Software will initially collaborate with WVBOM to establish the security configurations for the ArcHealth system, future adjustments can be made by authorized West Virginia system administrators, ensuring no dependency on external technical assistance.

ArcHealth provides system administrators with a wide array of options to customize security settings, catering to specific organizational needs. The security framework within ArcHealth is designed to be **both department and role centric**. This structure enables users to hold roles across single or multiple departments, each with distinct access privileges. Such a model will be particularly beneficial for managing access. It allows users to access data from one or more Board, ensuring that access to information is appropriately restricted and aligned with each Board's specific requirements.

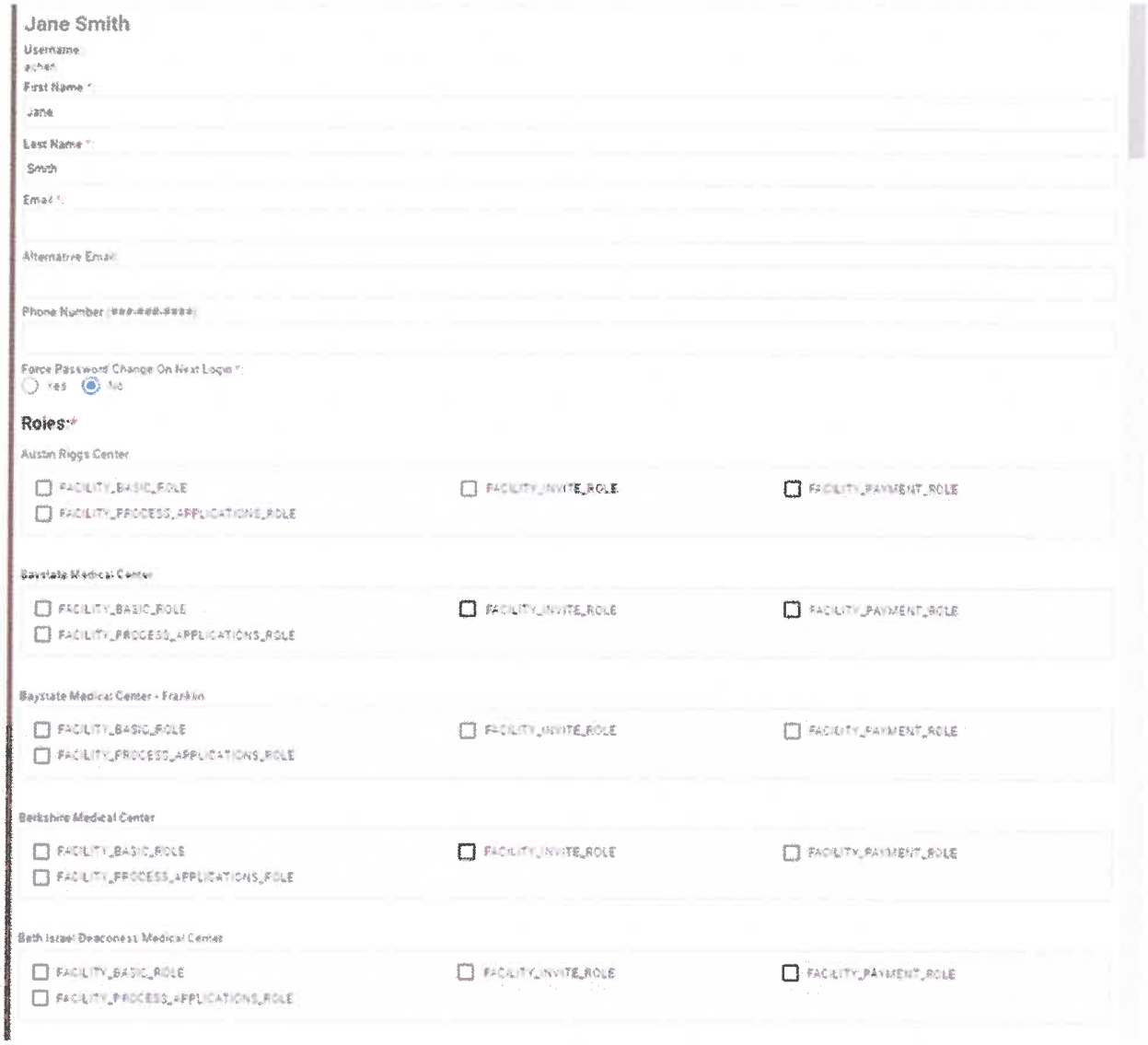
Administrators can manage these roles, setting up user roles such as Board Staff, Investigators, and Licensing Staff, among others. ArcHealth simplifies the creation of new roles and the assignment of permissions through its user-friendly interfaces, allowing for the selection or de-selection of specific grants with ease. Permissions in ArcHealth are comprehensive, ranging from record viewing and editing, to managing system configurations, scheduling inspections, and the establishment of new roles and users. The security framework of ArcHealth ensures meticulous control over the activities that each role is authorized to perform within the system.

Additionally, ArcHealth maintains a detailed audit trail of all changes made to user access levels. This feature ensures complete transparency and accountability, providing a comprehensive record of modifications for security and compliance purposes. The security framework of ArcHealth guarantees precise control over the functionalities that each role is permitted within the system.

A graphical depiction of the security settings interface for a particular role is illustrated in the figure below.



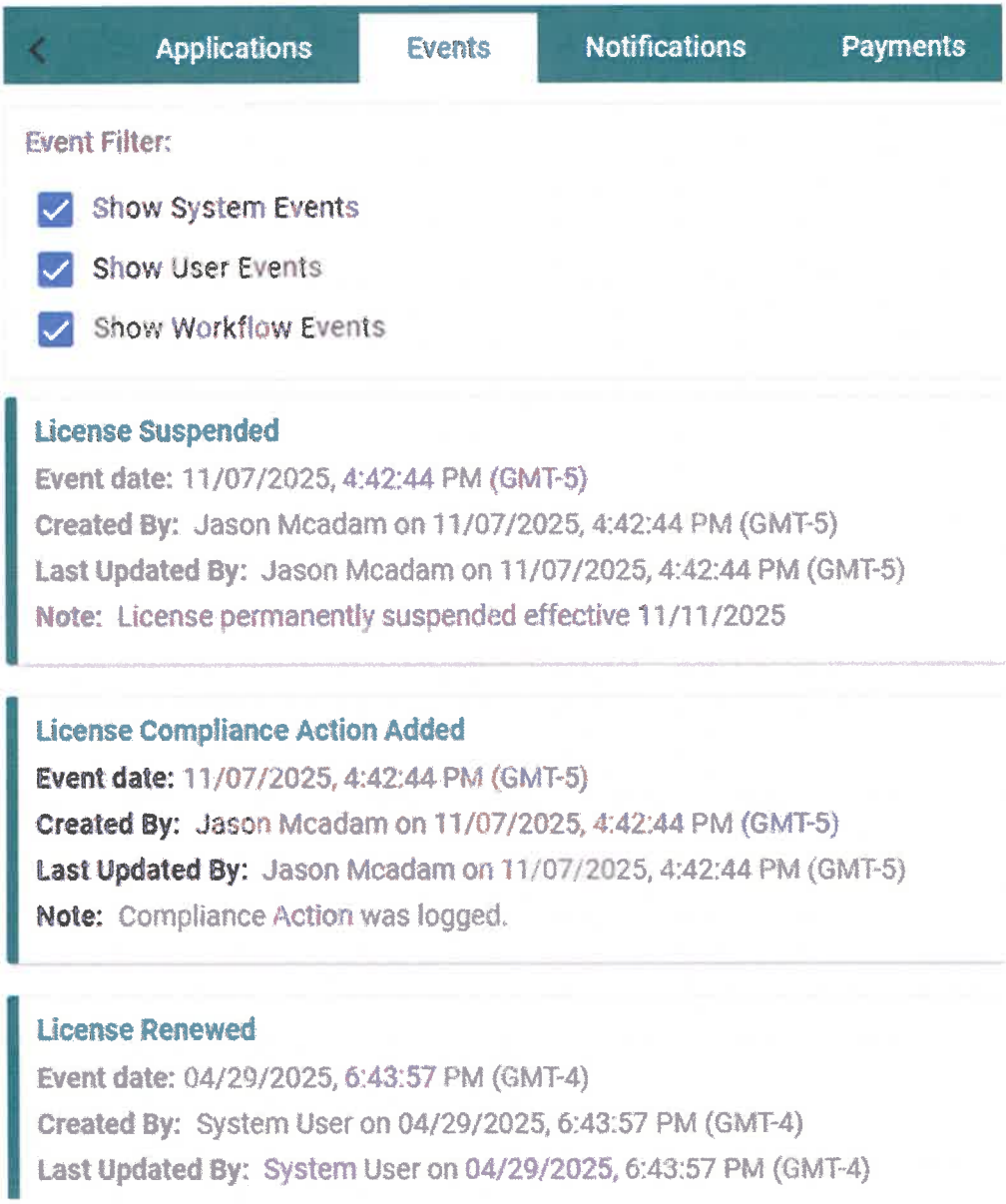
ArcHealth Security Role Configuration



ArcHealth Application User Security Configuration

5.24. Archives and Audit Trails

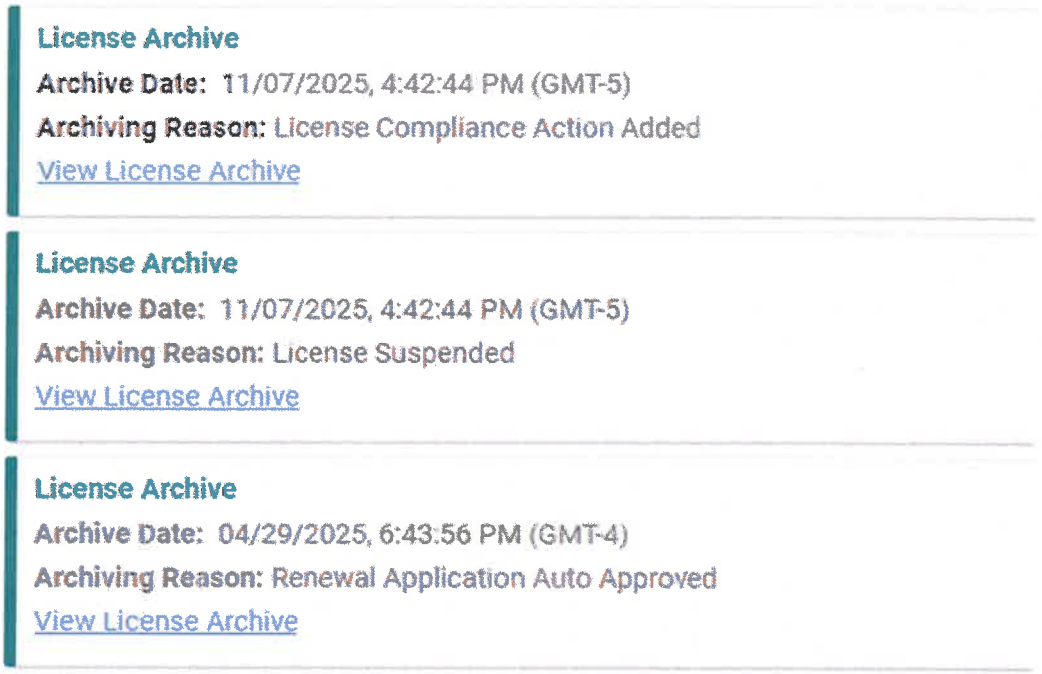
The system supports comprehensive auditing of user actions. Every record in the system, including licenses, applications, and complaints, has an "Events" section that logs the complete history of changes and updates to the record, whether performed by a user or the system itself.



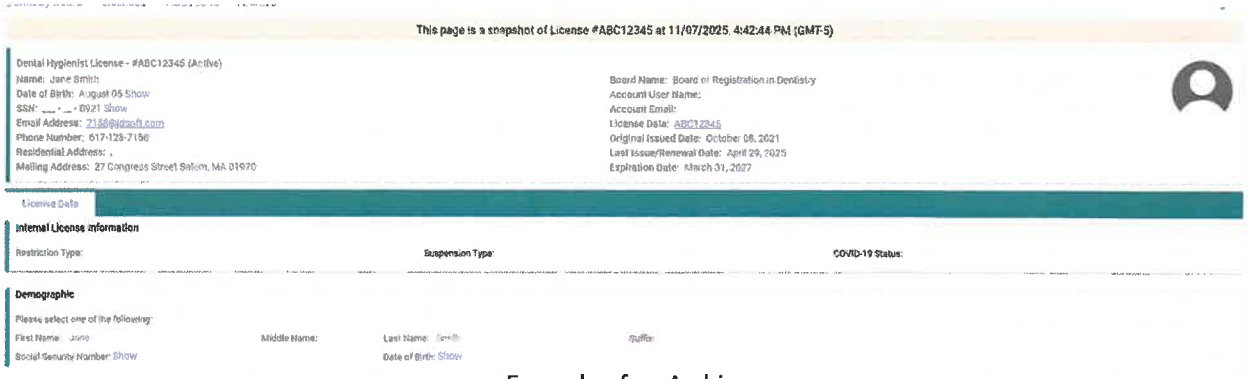
ArcHealth Event History

Before any change is committed to any record in the system, a snapshot of the record (called an archive) is taken and saved. This archive cannot be edited and is kept for data retention and record history purposes.

Example of data update log



History of archives on a license record



Example of an Archive

6. Technical Specifications

6.1. Application Security and Compliance

JD Software specializes in delivering mission-critical systems to large-scale user communities within the public sector. We employ a formal Agile-based methodology that emphasizes traceability and security throughout the entire development lifecycle. Each requirement is meticulously documented, designed, developed, reviewed, and validated. This process aligns with specific Framework Controls (such as NIST AC-2) and is evident across all stages including User Stories, Epics, Logical & Physical Designs, Network & Data Flow Diagrams, Code, Test Plans & Results, and Release Notes. We also conduct a separate and dedicated workstream for security testing, ensuring accountability and visibility in meeting the acceptance criteria.

Our Information Security Program and the ArcHealth Software are aligned with the National Institute of Standards & Technology (NIST) SP 800-53 guidelines for security and privacy controls. JD Software's adoption of the NIST standard, combined with our Professional Services, allows us to tailor the ArcHealth implementation to comply with additional regulations like HIPAA/HITECH.

ArcHealth adheres to the Payment Card Information – Data Security Standard v3.1 (PCI-DSS), and our architecture ensures that no Credit Card Data is stored or traverses our infrastructure.

In accordance with JD Software's policy, all protected data is encrypted both at rest and in transit. We routinely ensure the use of secure encryption protocols and chippers, compliant with relevant security requirements and frameworks.

The ArcHealth system, alongside our Security Program, undergoes regular audits and tests (including penetration and vulnerability scanning) conducted by specialized third-party organizations in Information Security. This comprehensive examination covers the entire ArcHealth development and implementation lifecycle, from hosting to monitoring services, reinforcing our commitment to robust security measures and practices.

6.2. Architecture, Frameworks and Libraries

The ArcHealth system is a cloud-native application built meticulously using a wide array of recognized platforms, services, frameworks, and libraries, including:

- AWS PostgreSQL RDS (cross-platform relation Database-as-a-Service)
- Node.js (Event-driven JavaScript Runtime)
- Nest.js (Web Application Server Framework)
- Angular (Web Application Front End Framework)
- ClamAV (Virus Scan Engine)

- Redis (Data Cache Store)
- Squid (Proxy Server)
- Docker (Platform for Containerizing and Deploying Applications)
- AWS Fargate (Serverless Container Execution Platform)
- Amazon S3 (Cloud Storage/Document repository)

At its core, the system relies on micro REST (Representational State Transfer) APIs, offering several advantages:

- REST offers a lightweight yet feature-rich approach, ensuring high performance and an intuitive, user-friendly API.
- RESTful web services are easily consumable by a wide range of tools, including cost-effective options, simplifying integration with other applications.
- Its architecture promotes extreme scalability, making it ideal for cloud hosting.

The ArcHealth system has sub-second response times for API calls. ArcHealth's architecture is cloud-based and is extremely scalable by design and can be augmented to meet any workload requirements.

6.3. Accessibility

The ArcHealth system is compliant with WCAG 2.1 Level AA and Section 508 of the Amendment to the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act (ADA). JD Software will supply West Virginia with Voluntary Product Accessibility Template (VPAT) as part of this engagement.

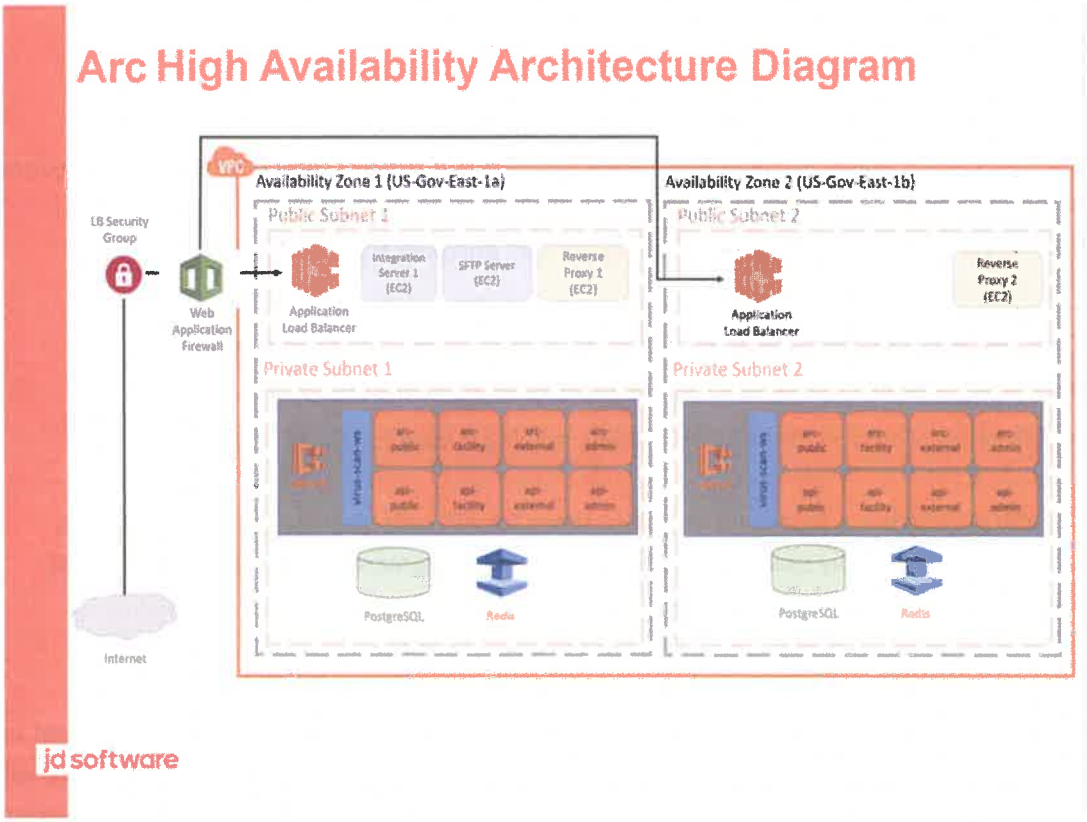
6.4. Hosting Environment

We propose a solution hosted on Amazon Web Services (AWS) FedRAMP compliant GovCloud (US) Region in a Dedicated Virtual Private Cloud (VPC) under a Software-as-a-Service (SaaS) model. To ensure compliance and provide security in depth, the system implements many security controls such as encryption of data at rest and in transit across the board using strong ciphers, strong Key management using AWS Key Management, default deny all on firewalls and ACLs, proxied and whitelisted outbound traffic, Strong Authentication and Authorization with new tokens issued with each API request and old ones invalidated after a single use, Virus Scanning and more.

JD Software hosts the ArcHealth system in the cloud with an SLA of 99.95 on dedicated servers. JD Software will maintain the following environments:

- Development Environment
- System Test Environment
- QA/UAT Environment
- Training Environment
- Production Environment

The following diagram presents a high-level architecture of the system and shows the built-in redundancies that ensure the system is reliable and fault tolerant. The following figure represents a high-level architecture diagram of the system.



ArcHealth System Architecture Diagram

7. Project Management Plan

7.1. Project Management Approach

JD Software follows a structured, phased implementation methodology designed to promote early alignment, iterative development, and thorough testing. The approach emphasizes collaboration with agency subject matter experts (SMEs), transparency throughout the process, and careful planning to support a smooth transition to the ArcHealth platform.

Phase 1: Project Initiation and Planning (2 Months)

This phase establishes project governance, clarifies expectations, and builds a shared understanding of goals and requirements. Key activities include:

- Conducting kickoff meetings to confirm roles, responsibilities, scope, communication paths, and decision-making processes.
- Establishing project milestones and defining collaboration and reporting procedures.
- Reviewing applicable regulations, policies, and business processes relevant to licensing, enforcement, and related operations.
- Analyzing existing forms, workflows, and supporting materials to identify functional requirements.
- Performing an initial review of legacy data to assess structure, completeness, and potential data-quality concerns.

This phase provides the foundation needed to configure the system effectively.

Phase 2: System Configuration & Joint Application Design (12 Months)

JD Software uses a Joint Application Design (JAD) approach to configure ArcHealth in collaboration with agency SMEs. This iterative model helps ensure that the system reflects actual business processes and that stakeholders remain engaged throughout development. JAD sessions typically include:

- Setting clear meeting objectives, such as demonstrating an initial prototype for a specific application or workflow.
- Reviewing a working prototype, walking through configured workflows, and gathering questions and feedback from participants.
- Revising the prototype by incorporating stakeholder feedback and presenting an updated configuration in subsequent sessions until the solution meets requirements.

The JAD process is applied to all major areas of the system, including:

- Initial, renewal and amendment applications
- Complaint intake and investigative workflows
- Licensing, disciplinary, and monitoring processes
- Integrations with external systems
- User roles, permissions, and administrative settings
- Email notifications and messaging workflows
- Certificate, permit, and license design templates

- Document generation and associated outputs

During this phase, JD Software also works with the agency to develop Extract, Transform, and Load (ETL) processes for migrating legacy data into ArcHealth. Migration work is reviewed incrementally, as described in Section 7.3: Data Migration.

Phase 3: User Acceptance Testing (2 Months)
JD Software provides a dedicated QA environment for User Acceptance Testing (UAT). Activities include:

- Weekly meetings to review test progress and address questions.
- Regular updates to the QA environment based on issues identified.
- A structured set of test scenarios aligned with configured workflows.
- Hands-on support to assist testers as needed.

The purpose of UAT is to validate that the system functions as intended before deployment.

Phase 4: Training (1 Month)
Training is delivered once configuration is finalized and UAT is complete. JD Software provides:

- Recorded training sessions with accompanying live Q&A.
- Detailed user guides covering operational and administrative functions.
- Video tutorials for internal and external users, such as:
    - Applying for or renewing a license
    - Amending license information
    - Creating a user account
    - Submitting a complaint

These materials remain available for reference after go-live.

Phase 5: Go-Live and Post-Go-Live Support (Final Month)
JD Software coordinates and executes the production cutover once the system is approved for deployment. A typical go-live sequence includes:

- Decommissioning the legacy system.
- Receiving a final copy of legacy data.
- Running the ETL process and validating migrated data in the production environment.
- Releasing the system to internal and public users

Post-Go-Live Hypercare
Following go-live, JD Software provides daily hypercare support sessions for three weeks. Users can ask questions, raise issues, and receive immediate assistance. Items are escalated promptly to maintain operational continuity. Once the system stabilizes, the project transitions into the long-term support model defined in the contract.

7.2. Communications Plan

During this project, JD Software commits to weekly status calls to monitor and report on progress towards all project objectives. Additionally, at each project milestone, we will hold a decision meeting with key stakeholders. These meetings are designed to assess the completion of the milestone, review associated deliverables, and gather feedback.

Weekly status reports will be provided to the WVBOM project manager, ensuring transparent communication of project developments. In the event of potential delays, JD Software's project manager will promptly inform WVBOM's project manager, detailing the cause of the delay and outlining the remedial actions being taken to mitigate the impact and accelerate project progress

7.3. Data Migration

JD Software will manage the migration of WVBOM's legacy data into the ArcHealth platform using a structured, industry-standard migration methodology. Data migration is often one of the highest-risk components of system modernization projects, particularly when legacy datasets contain incomplete fields, inconsistent values, or limited documentation. To reduce these risks, JD Software will begin data discovery and planning early in the project and will coordinate closely with the State Project Manager and designated WVBOM staff throughout the process.

1. Initial Data Assessment and Planning

Upon receipt of the legacy datasets, JD Software will load the data into a dedicated staging environment configured with production-level security controls, including access restrictions, encryption, and audit logging. In this environment, JD Software and WVBOM staff will jointly:

- Review existing data structures and metadata
- Identify source tables, relationships, and data dependencies
- Assess data quality, including completeness, consistency, and formatting
- Identify missing, obsolete, or non-standard values
- Determine additional data elements needed to support ArcHealth's data model

When issues are identified, JD Software will document findings and provide remediation options. These may include rule-based backfilling, data normalization, establishing default values, or documenting acceptable exceptions when historical data cannot be reconstructed.

2. ETL Development (Extract, Transform, Load)

Using the results of the data assessment, JD Software will design and build Extract, Transform, and Load (ETL) processes tailored to WVBOM's datasets.These ETL workflows will:

- Extract data from legacy sources
- Cleanse and standardize values
- Map legacy fields to ArcHealth schema elements

- Perform necessary data transformations
- Validate referential integrity and required field completeness

ETL jobs will be developed iteratively and maintained by JD Software for the duration of the project.

3. Iterative Test Loads and Validation Cycles
Following the development of each ETL iteration, JD Software will load the transformed data into a controlled Quality Assurance (QA) environment. WVBOM staff will have access to validate the data and confirm that:

- Records migrated accurately
- Key fields match or appropriately align with the legacy system
- Historical information is preserved as expected
- Data relationships and dependencies are intact

JD Software will collect feedback from each validation cycle and refine ETL processes accordingly. Multiple cycles are expected to ensure accuracy and completeness prior to production cutover.

4. Final Migration and Cutover Preparation
As part of the go-live preparation, JD Software will perform:

- A final extraction of legacy data
- Execution of the validated ETL workflows
- Loading into the production ArcHealth environment
- Integrity checks and validation scripts

WVBOM staff will verify data conditions prior to the system opening for applicant and staff use.

We have successfully applied this methodology with other agencies facing similar challenges, including legacy systems with incomplete fields, inconsistent historical entries, or limited documentation. In those projects, early assessment, clear remediation steps, and multiple validation cycles proved effective in reducing risk and ensuring that the final migrated data was accurate and reliable, even when the original data required significant cleanup.

8. Support and Maintenance

8.1. Support and Maintenance Scope

JD Software provides a comprehensive support and maintenance program designed to ensure the continued stability, security, and performance of the ArcHealth platform throughout its operational lifecycle. Services include incident management, system monitoring, security maintenance, and ongoing operational support for all components delivered under the contract.

Support Services

JD Software provides Tier One, Tier Two, and Tier Three support services during standard business hours (9:00 AM–6:00 PM EST/EDT, Monday through Friday, excluding holidays). Support services include:

- Response, triage, and resolution of reported issues based on priority and impact.
- Assistance to agency staff in the use and operation of ArcHealth.
- Escalation procedures to ensure timely remediation of high-impact incidents.

System Monitoring and Operational Assurance

To maintain system reliability and performance, JD Software performs continuous operational monitoring, including:

- Application performance monitoring and proactive problem detection.
- Infrastructure and capacity monitoring to ensure resources scale appropriately.
- Ongoing security monitoring to identify and mitigate threats.
- Regular system health checks and operational reviews.

Security, Backup, and Recovery

JD Software maintains the security and integrity of the system and underlying data through:

- Continuous application of security best practices and periodic vulnerability assessments.
- Automated, encrypted backups with defined retention policies.
- Disaster recovery capabilities that support continuity of operations.
- Monitoring and remediation of potential security risks in coordination with agency contacts.

Incident Response and Emergency Releases

JD Software provides incident response services and performs emergency releases when critical issues are identified. Emergency releases include all activities necessary to correct defects that:

- Cause failure of one or more critical system functions.
- Impair performance of major functionality or create a material risk to system reliability or data integrity.
- Limit or disable required functionality delivered under the contract.

Emergency release activities include code corrections, validation, deployment planning, production implementation, and all associated technical artifacts and documentation.

Third-Party Software and Security Updates
JD Software manages and deploys updates to third-party libraries, frameworks, and platform components to ensure continued security and compliance. This includes:

- Preparing and validating update artifacts.
- Coordinating testing and deployment of required patches.
- Communicating changes that may affect system behavior or user experience.

8.2. Service Level Agreement

JD Software will use commercially reasonable efforts to make the overall system availability at least 99.95% on a rolling annual basis. This translates to no more than 78 minutes of unplanned outage (denominator for the calculation: 365 days per year x 24 hours per day x 60 minutes per hour). For purposes of calculating uptime percentage, (i) scheduled maintenance may be excluded; and (ii) periods of force majeure affecting uptime may be excluded.

For failure to meet the uptime percentage in any given calendar month, we shall have the following remedies:

- For the first failure to meet the minimum uptime percentage, shall receive a credit equal to 200% of the prorated portion of the subscription payment applicable to the period of the outage.
- For any additional failures to meet the minimum uptime percentage in that calendar month, shall receive a credit of not more than 10% and not less than 1% of the overall monthly subscription payment calculated in accordance with the following:
- 1% for downtime less than 99.99% but equal to or greater than 99.70%
- 5% for downtime less than 99.69% but equal to or greater than 99.30%
- 10% for downtime less than 99.29%
- JD Software may issue credits or extensions in service period at no cost in lieu of payment reductions. Such remedies shall be issued by JD Software with no action required from WVBOM.
- For all unplanned outages, JD Software shall provide root cause analysis within thirty (30) days of unscheduled downtime at no additional cost.
- Scheduled maintenance must be conducted between 6:00 p.m. and 6:00 a.m. EST unless otherwise agreed upon, and scheduled maintenance must occur with at least two (2) business days' advance notice. Defects in the Service are classified in the following levels of priority:
- **Urgent**: Issue/problem has caused, or has potential to cause, the entire Service to become unavailable or result in a security breach.
- **High**: Issue/problem directly prevents all or a large number of Authorized Users from using the Service. High-priority problems include but are not limited to those that render key functions of the Service inoperable, significantly slow processing of data, severely impact multiple Authorized Users, or severely corrupt data.

- **Medium**: Medium priority problems include those errors that slow the processing of data by a small degree, render minor and non-critical functions of the Service.

9. Addendum A:

Designated Contact
and
Certification and Signature

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:	Matthew Poussard | Director of Software Development
Address:	27 Congress Street, Suite 1310 Salem, MA 01970
Phone Number:	978-224-1497
Email Address:	mpoussard@jdsoft.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.

Company:	JD Software
Signature of Authorized Representative:	Matthew Poussard
Printed Name and Title of Authorized Representative:	Matthew Pouusasrd Director of Software Development
Date:	11-13-2025
Phone Number:	978-224-1497
Email Address:	mpoussard@jdsoft.com

10. Addendum B:

Addendum Acknowledgement

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)

[X] Addendum No. 1	[ ] Addendum No. 6
[X] Addendum No. 2	[ ] Addendum No. 7
[X] Addendum No. 3	[ ] Addendum No. 8
[ ] Addendum No. 4	[ ] Addendum No. 9
[ ] Addendum No. 5	[ ] 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.

Company: JD Software

Authorized Signature: Matthew Poussard

By: Matthew Poussard
Director of Software Development

Date: 11/13/2025

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