



Big Picture™ Software

Title Page

REQUEST FOR PROPOSAL

**West Virginia Board of Medicine CRFP 0945 BOM2600000001
DATABASE SYSTEM AND MAINTENANCE**

Solicitation # CRFP 0945BOM2600000001

Albertson Consulting Inc/Big Picture Software Technical Proposal

Bid Submission Deadline: 12/17/2025 Time: 1:30 pm EST

Submitted by: Albertson Consulting Inc./Big Picture Software

Address: 21 Main Street South, Minot ND 58701

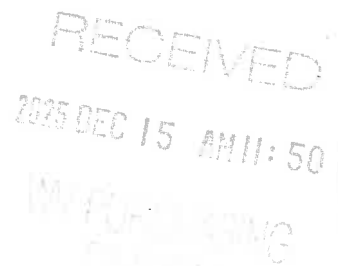
Phone: Direct Line 701-660-8029 Ext 107 Cell: 701-720-8817

Contact Person: Troy Rauschenberger Director of Government Markets

Email: troy@ebigpicture.com

Signature: 

Date: 12/16/20205





Big Picture™ Software

Addendum Acknowledgement

VENDOR NAME: Albertson Consulting Inc./Big Picture Software

BUYER: Larry D McDonnell

SOLICITATION NO.: CRFP0945 BOM2600000001

BID OPENING DATE: 12/17/2025

BID OPENING TIME: 1:30 PM EST/EDT

FAX NUMBER: 304-558-3970

PLEASE NOTE: This CRFP Response is our newest response and supersedes any previous responses submitted.

Thanks,

A handwritten signature in black ink, appearing to read 'Troy Rauschenberger'.

Troy Rauschenberger

Albertson Consulting Inc/Big Picture Software



Big Picture™ Software

Contents

Title Page	1
Addendum Acknowledgement.....	5
Executive Summary.....	9
Designated Contact.....	10
VENDOR DETAILED RESPONSE TO CRFP 0945 BOM200000001	11
SECTION 4: PROJECT SPECIFICATIONS	11



Big Picture™ Software

	Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	State of West Virginia Centralized Request for Proposals Info Technology
---	--	--

Proc Folder: 1739608		Reason for Modification:	
Doc Description: Medical Licensure / Records Database Maintenance System		Addendum 05	
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2025-11-24	2025-12-17 13:30	CRFP 0945 BOM2600000001	6

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

VENDOR		
Vendor Customer Code:		
Vendor Name : Albertson Consulting Inc./Big Picture Software		
Address :		
Street : 21 Main Street South		
City : Minot		
State : North Dakota	Country : USA	Zip : 58701
Principal Contact : Troy Rauschenberger		
Vendor Contact Phone: 701-660-8029	Extension: 107	

FOR INFORMATION CONTACT THE BUYER
Larry D McDonnell 304-558-2063 larry.d.mcdonnell@wv.gov

Vendor Signature X 	FEIN# 45-0459847	DATE 12/16/2025
All offers subject to all terms and conditions contained in this solicitation		

ADDITIONAL INFORMATION

Addendum 05.

To attach answers to vendor questions.

To include clarification and revisions.

To attach WV Board of Medicine Statistical Information.

Bid opening date has been extended from 12/03/2025 to 12/17/2025.

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

No other changes

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

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

Comm Code	Manufacturer	Specification	Model #
81111507			

Extended Description:

See attached documentation for further details.

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



Big Picture™ Software

Addendum Acknowledgement

	Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	State of West Virginia Centralized Request for Proposals Info Technology
---	--	--

Proc Folder: 1739608		Reason for Modification:	
Doc Description: Medical Licensure / Records Database Maintenance System		Addendum 05	
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2025-11-24	2025-12-17 13:30	CRFP 0945 BOM2600000001	6

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code:
Vendor Name : Albertson Consulting Inc./Big Picture Software
Address :
Street : 21 Main Street South
City : Minot
State : North Dakota **Country :** USA **Zip :** 58701
Principal Contact : Troy Rauschenberger
Vendor Contact Phone: 701-660-8029 **Extension:** 107

FOR INFORMATION CONTACT THE BUYER

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

Vendor
Signature X 

FEIN# 45-0459847

DATE 12/16/2025

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



Big Picture™ Software

ADDITIONAL INFORMATION

Addendum 05.
 To attach answers to vendor questions.

To include clarification and revisions.

To attach WV Board of Medicine Statistical Information.

Bid opening date has been extended from 12/03/2025 to 12/17/2025.

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

No other changes

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

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

Comm Code	Manufacturer	Specification	Model #
81111507			

Extended Description:
 See attached documentation for further details.

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



Big Picture™ Software

SOLICITATION NUMBER: CRFP BOM26*01

Addendum Number: 5

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

- ☒ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☒ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☒ Correction of error
- ☐ Other

Description of Modification to Solicitation:

To attach answers to vendor questions.

To include clarification and revisions.

To attach WV Board of Medicine Statistical Information.

Bid opening date has been extended from 12/03/2025 to 12/17/2025.

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

No other changes

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ADDENDUM ACKNOWLEDGEMENT FORM SOLICITATION NO.: CRFP BOM26*01

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

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

Addendum Numbers Received:

(Check the box next to each addendum received)

☒ Addendum No. 1	☐ Addendum No. 6
☒ Addendum No. 2	☐ Addendum No. 7
☒ 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.

Albertson Consulting Inc./Big Picture Software

Company



Authorized Signature

12/16/2025

Date

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



Big Picture™ Software

Executive Summary

Albertson Consulting Inc., the developer of Big Picture Software, is honored to submit our response to CRFP BOM26-01 for the continued support and enhancement of the West Virginia Board of Medicine's professional licensing and regulatory platform. As the Board's current vendor for over a decade, we bring a proven track record of success, system stability, and a deep understanding of the Board's evolving operational and regulatory requirements.

Our partnership with the Board has been built on responsiveness, performance, and a shared commitment to public protection. Over the past ten years, we have consistently delivered reliable hosting, timely support, and customized enhancements aligned with the Board's statutory mandates and administrative workflows. From the seamless handling of initial applications and renewals to integrations with the Federation of State Medical Boards (FSMB), we have demonstrated our ability to meet both functional and security requirements at scale.

As the Board evaluates its future technology strategy, we are confident in our ability to continue supporting your goals through the next phase of digital transformation. Our cloud-hosted, configurable licensing platform remains purpose-built for state medical boards, supporting advanced features such as role-based dashboards, CE tracking, automated workflows, secure payment processing, public disciplinary search, and robust reporting. We are also committed to maintaining compliance with state IT policies, security standards, and data privacy regulations.

Our team remains in good standing with the Board and its leadership, and we are fully prepared to meet every specification outlined in the CRFP while providing continuity, cost efficiency, and deep institutional knowledge. With zero vendor ramp-up time and an already-integrated system in production, we represent the lowest risk and highest value partner for the Board of Medicine moving forward.

We thank you for the continued opportunity to serve the West Virginia Board of Medicine and look forward to building upon the strong foundation we've established together.

Regards,



Troy Rauschenberger
Director of Government Markets
Big Picture Software

701-720-8817 Cell
701.660-8029 ext.107 Office
www.ebigpicture.com | troy@ebigpicture.com



Big Picture™ Software

Designated Contact

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) Troy Rauschenberger Director of Government Markets

(Address) 21 Main Street South Minot North Dakota 58701

(Phone Number) / (Fax Number) 701-660-8029 Ext. 107 Fax# N/A

(email address) troy@ebigpicture.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.

Albertson Consulting Inc./Big Picture Software

(Company) Troy Rauschenberger

(Signature of Authorized Representative)
Troy Rauschenberger Director of Government Markets 12/16/2025

(Printed Name and Title of Authorized Representative) (Date)
701-660-8029 Ext. 107

(Phone Number) (Fax Number)

troy@ebigpicture.com

(Email Address)

Revised 10/17/2024

Request for Proposal

VENDOR DETAILED RESPONSE TO CRFP 0945 BOM200000001

SECTION 4: PROJECT SPECIFICATIONS

4.1. Background and Current Operating Environment: The WVBOM is the state agency charged with protecting the health and safety of the public through the licensure, regulation and oversight of medical doctors (MDs), podiatric physicians (DPMs), and collaborating physician assistants (PAs). WVBOM's office is located in Charleston, West Virginia. The WVBOM is comprised of fifteen (15) Board members that serve terms constituted through gubernatorial appointments. Additionally, the WVBOM employs seventeen (17) staff members.

The WVBOM issues various types of practice credentials, including licenses, registrations, permits and authorizations. The WVBOM maintains historical records for all applicants and credential holders. Additional regulatory duties performed by WVBOM include managing complaints regarding its licensees and/or credential holders, performing investigations, and taking disciplinary action when necessary.

Exhibit 1 provides a general overview of the various types of licenses, credentials, and historical records currently housed in the content management database.

EXHIBIT 1: SUMMARY OF RECORDS

Credential Type	Quantity
Active / Inactive Allopathic Physician ("MD") Licensees	9817
Active / Inactive Podiatric Physician ("DPM") Licensees	156
Active Physician Assistant ("PA") Licensees	1472
Active Educational Permit Holders (MDs)	750
Active Administrative Medicine Licensees (MDs)	16
Active Medical School Faculty Licensees (MDs)	8
Active Extraordinary Circumstance Licensees (MDs)	7
Active Interstate Telehealth Registrants (MDs, PAs and DPMs)	202
Active Physician Drug Dispensing Certificates (MDs, DPMs and PAs)	329
Active Medical Corporations/PLLC	559
Disciplinary Actions	3000
Expired/Historical Records	20000

WVBOM maintains records for over 36,000 past and present credential holders with the expectation that this number will grow annually and could reach more than 40,000 within five (5) years.

WVBOM's current content management database, cloud-documentation platform, and website are products provided by the same vendor. These products are approximately ten (10) years old. These systems were developed utilizing Oracle, HTML, and JavaScript.

WVBOM is also in possession of digital historical data from its original database that was not migrated to the WVBOM's current database.

The existing WVBOM systems have several limitations. These limitations include, but are not limited to:

- Inability to create digital applications to replace existing paper applications (initial and renewal)
- Inability to update existing digital applications
- Inability to update certificates for initial and renewal licensure
- Lack of a user web portal for tracking of application status.
- Lack of customization of data exports available.
- Limited reporting features
- Inability to retain complete historical data
- Slowness in data retrieval which creates difficulties in processing applications and answering corresponding questions in a timely manner

To support WVBOM's mission to protect the health and safety of the public, the winning vendor's solution will assist in streamlining WVBOM processes and thus creating ease of access for both WVBOM staff, the general public and applying/renewing credential holders.

RESPONSE:

The West Virginia Board of Medicine (WVBOM) is the regulatory agency responsible for safeguarding the health and safety of the public by licensing, regulating, and overseeing medical doctors (MDs), podiatric physicians (DPMs), and collaborating physician assistants

(PAs). Located in Charleston, West Virginia, the WVBOM is comprised of **fifteen (15) gubernatorially appointed Board members** and supported by a professional staff of **seventeen (17)**.

The WVBOM performs a wide range of regulatory functions, including:

- Issuance of licenses, registrations, permits, and authorizations.
- Maintenance of complete historical records for applicants and credential holders.
- Management of complaints, investigations, and disciplinary actions.
- Oversight of more than **36,000 past and present credential holders**, with projections to exceed **40,000 within five years**.

Current Operating Environment

The WVBOM's existing systems—including its content management database, cloud documentation platform, and website—were provided and maintained by **Big Picture Software** for more than ten years. These systems originally developed using **Oracle, HTML, and JavaScript**, have supported WVBOM through a decade of regulatory operations. However, limitations in customization, scalability, and performance have emerged as technology and Board needs have evolved. Additionally, WVBOM retains **digital historical data from an earlier database** that was not fully migrated into the current system.

Proposed Modernization

Big Picture Software proposes to **upgrade WVBOM to version 6.14.next of our licensing and regulatory management platform**. This upgrade resolves the limitations of the current system while preserving the stability, historical continuity, and functionality that WVBOM staff rely upon. Because the modernization is an upgrade rather than a full system replacement, the project will:

- Maintain **continuity of service** for staff, credential holders, and the public.
- Provide **seamless integration** with WVBOM's website and regulatory processes.
- Ensure that **all historical records and legacy data** are migrated into the new system.
- Deliver enhanced performance, reporting, user self-service tools, and compliance features.

Summary: WVBOM operates in a high-volume, regulatory-intensive environment, and Big Picture Software is uniquely positioned to support its modernization. With more than a decade of direct service to WVBOM, our proposed upgrade to version 6.14 next ensures that the Board gains the efficiency, security, and scalability it needs while minimizing disruption and safeguarding historical data.

The existing WVBOM systems have several limitations. These limitations include, but are not limited to:

- *Inability to create digital applications to replace existing paper applications (initial and renewal)*
- *Inability to update existing digital applications*
- *Inability to update certificates for initial and renewal licensure*
- *Lack of a user web portal for tracking of application status.*
- *Lack of customization of data exports available.*
- *Limited reporting features*
- *Inability to retain complete historical data*
- *Slowness in data retrieval which creates difficulties in processing applications and answering*

corresponding questions in a timely manner

To support WVBOM's mission to protect the health and safety of the public, the winning vendor's solution will assist in streamlining WVBOM processes and thus creating ease of access for both WVBOM staff, the general public and applying/renewing credential holders.

Response:

Big Picture Software proposes an **in-place upgrade to version 6.14 next**. This upgrade is not a rebuild or vendor transition, but a seamless modernization. Because WVBOM is already on our platform:

- **Data migration scope is minimal**, limited to schema migrations (DDL), transformation for new fields, and index optimizations.
- **Historical continuity is preserved**, and if desired, previously retained digital historical data not in the current system can also be incorporated.
- The upgrade introduces enhanced features, faster performance, and expanded self-service tools while minimizing disruption.

Responses to Identified Limitations

- **Inability to create digital applications / Inability to update existing digital applications**
 - ✓ Already addressed in version 6.14 next, which allows staff to create, modify, and manage applications digitally without custom coding.
- **Inability to update certificates for initial and renewal licensure**
 - ✓ Enhanced certificate management features are available in the upgrade, enabling staff to revise, reissue, and maintain records. If additional customization is needed, it will be included as part of this RFP.
- **Lack of a user web portal for tracking of application status**
 - ✓ The upgrade delivers a **Licensee self-service portal**, giving applicants and credential holders real-time access to application status, renewal tracking, and communication with the Board.
- **Lack of customization of data exports**
 - ✓ The upgrade introduces **expanded reporting and export tools** with customizable options. Staff can generate ad-hoc and scheduled exports without technical intervention.
- **Limited reporting features**
 - ✓ Version 6.14 next includes a **robust reporting engine** with advanced filtering, saving of templates, and financial and operational reports built-in.

- **Inability to retain complete historical data**
 - ✓ The upgraded system features **enhanced data-loading capabilities**, ensuring historical data is preserved and accessible for regulatory and reporting purposes.
 - **Slowness in data retrieval**
 - ✓ The upgrade introduces **optimized indexing and retrieval performance improvements**, ensuring faster query response and reduced staff delays in processing applications or responding to inquiries.
-

Summary: Big Picture Software's upgrade approach directly resolves each limitation identified by WVBOM while ensuring minimal disruption to staff, members, and the public. By moving from v6.10 to v6.14 next, WVBOM will gain modernized features, faster performance, and expanded self-service tools, all while retaining the stability and familiarity of the existing platform.

***4.2 Project Goals and Mandatory Requirements:** Vendor should describe its approach and methodology to provide the service or solve the problem described by meeting the goals/objectives identified below. Vendor's response should include any information about how the proposed approach is superior or inferior to other possible approaches.*

Response: Big Picture Software fully understands the requirements of **4.2**

Big Picture Software's approach to meeting the project goals and mandatory requirements for the WVBOM centers on **leveraging our existing, proven platform (currently in use by WVBOM for 10+ years)** and upgrading it to the latest version (v6.14 next). This methodology ensures continuity of service, minimizes disruption, and delivers a modernized solution that exceeds requirements in scalability, compliance, and user experience.

Approach and Methodology

1. Upgrade, Not Replace

- Because WVBOM already operates on our system, this project is not a risky "rip and replace." Instead, we provide a **seamless upgrade** with full data migration, preserving historical records and existing workflows while introducing enhanced capabilities.
- This approach dramatically reduces project risk, implementation costs, and staff retraining needs compared to adopting a completely new vendor platform.
- **No future cut over to an unproven system**

2. Comprehensive, Fully Integrated Solution

- The platform integrates licensing, renewals, disciplinary case management, reporting, payment processing, and secure document management into **one unified system**.
- A mobile-friendly **self-service portal** allows credential holders to apply, renew, track status, and download licenses—reducing staff workload and improving public transparency.

3. Security and Compliance First

- All systems are designed to comply with **HIPAA, PII, WCAG 2.1 AA, and State IT security standards**.
- Role-based access controls and secure cloud hosting ensure that sensitive data is protected at every level.

4. Incremental Implementation with Continuous Support

- Implementation follows a structured 8–12-month plan with clear phases: assessment, configuration, migration, validation, training, and go-live.
- WVBOM staff will receive **hands-on training and ongoing support** from the same team that has supported the Board for the past decade.

5. Future-Ready and Scalable

- The platform is designed to **accommodate future credential types, workflows, and reporting needs** without custom development.
- APIs and external integrations (FSMB, VeriDoc, Interstate Compact) ensure continued adaptability to national licensing standards.

Superiority of Our Approach

Compared to other possible approaches:

- **Lower Risk:** Competing vendors would need to build integrations and migrate data without firsthand knowledge of WVBOM's legacy system. Big Picture Software already maintains the system, giving us a unique advantage.
- **Cost-Effective:** By upgrading rather than replacing, WVBOM avoids unnecessary redevelopment costs while still gaining modern features.
- **Continuity of Service:** Applicants, credential holders, and staff experience little to no disruption during the transition.

- **Enhanced Capabilities:** Our upgraded version introduces improved reporting, self-service portals, cloud-based documentation, and faster data retrieval—all areas identified as limitations in the current system.

Summary: Big Picture Software's methodology—an upgrade-based, integrated, secure, and future-ready approach—directly addresses WVBOM's goals and mandatory requirements while minimizing risk, cost, and disruption. Our proven experience with WVBOM and other professional licensing boards makes this solution superior to starting fresh with a new vendor.

New features are available in the upgrade. If further functionality is required beyond standard and ad-hoc reports, those requirements will be collected and remedied as part of this RFP.

4.2.1 Goals and Objectives – *The project goals and objectives are listed below.*

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.*

Response: Big Picture Software fully understands the Goals and Objectives of requirement 4.2

Big Picture Software proposes a **secure, modernized replacement of WVBOM's legacy content management database and application/renewal system**. Because WVBOM has successfully operated on our platform for more than 10 years, this project represents an **upgrade to version 6.14 next**, not a complete redevelopment. This approach provides the benefits of modernization with **little to no disruption** for WVBOM staff, credential holders, or the public.

Secure, Modern Functionality

- The system is **fully web-based** and requires no desktop client software.
- All communications and data transfers are encrypted in compliance with **HIPAA, PII, and WCAG 2.1 AA standards**.
- Robust **role-based access controls (RBAC)** ensure that staff, board members, and credential holders only see and perform actions appropriate to their role.

Improved Efficiency & Business Processes

- The new platform consolidates applications, renewals, disciplinary case management, reporting, and document management into one unified database.

- Features such as automated workflows, customizable task management, and real-time notifications allow staff to process applications more efficiently.
- The integrated **self-service member portal** reduces administrative burden by allowing members to apply, renew, upload supporting documents, check status, and download licenses directly.

Minimal Disruption to Stakeholders

- Because this project is an upgrade of an already-deployed system, migration and transition will occur **seamlessly**.
- WVBOM staff will retain access to historical records and day-to-day operations throughout the transition.
- Applicants and credential holders will experience **continuity of service**, with new functionality phased in without downtime.

Scalability and Responsiveness to Change

- The platform is designed to support **future credential types, additional workflows, and new reporting requirements** without requiring redevelopment.
- The system is scalable to handle increased user load, expanded historical records, and integration with external APIs (e.g., FSMB, VeriDoc, Interstate Compact).
- Configurable business rules allow WVBOM staff to adapt forms, workflows, and reports directly, without vendor intervention.

Summary: Big Picture Software provides a secure, modern, and fully integrated platform that improves efficiency and public service while ensuring little to no disruption during transition. Our longstanding partnership with WVBOM uniquely positions us to deliver a seamless upgrade, scalable for future needs, and responsive to evolving regulatory and business requirements.

New features are available in the upgrade. If further functionality is required beyond standard and ad-hoc reports, those requirements will be collected and remedied as part of this RFP.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.2**.

Big Picture Software's **v6.14 next platform** provides a **single, fully integrated solution** that unites the licensing database, online application/renewal system, disciplinary compliance and monitoring system, and a secure cloud-based document management system.

Integrated Online Applications & Renewals

- The upgraded platform enables all credential types (current and future) to complete the **entire application and renewal process online**, including form completion, fee payment, document uploads, and license issuance.
- Members can access the system securely via the WVBOM website using any modern browser or mobile device, eliminating dependency on desktop client software.
- Features include real-time application tracking, automated notifications, and self-service tools to print licenses, wallet cards.

Disciplinary Compliance & Monitoring

- The system includes a **comprehensive case management module** for disciplinary and complaints tracking.
- WVBOM staff can record complaints, manage investigations, track deadlines, and archive outcomes with full audit history.
- The system supports secure storage of evidence files (documents, audio, video) and indefinite retention of historical case data in accordance with Board policy.

Cloud-Based Documentation System

- A **secure, HIPAA- and PII-compliant cloud documentation system** is built into the platform.
- Staff and board members can upload, share, and manage documents without requiring local storage, ensuring centralized and secure access.
- Access controls allow restriction of files to specific users or workspaces, while maintaining complete audit trails.

Key Benefits of Integration

- **Single Source of Truth:** All applications, compliance records, documents, and renewals flow into the same secure database.
- **Reduced Staff Burden:** Staff no longer need to operate multiple tools—reporting, compliance, and communications are all handled in one place.
- **Scalability:** The system is architected to support new credential types, workflows, and reporting needs without custom programming.
- **Mobile Accessibility:** Designed with a responsive interface to ensure usability across desktops, tablets, and smartphones.

Summary: Big Picture Software provides WVBOM with a unified, fully integrated system that consolidates licensing, compliance, and documentation functions into one modern, secure, and mobile-accessible platform. This exceeds the requirements by reducing silos, improving efficiency, and ensuring data consistency across all Board operations.

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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.3**.

Because WVBOM already operates on the **Big Picture v6.10** platform, this project represents an **upgrade to (v6.14.next)**, not a replacement or vendor transition. This unique continuity allows for a **complete and low-risk migration** of all current and historical data, ensuring data integrity and minimal operational disruption.

Recommended Data Migration Approach

1. Assessment and Mapping

- Conduct a comprehensive review of WVBOM's current database and historical data holdings.
- Develop a detailed **data mapping plan** aligning all legacy fields to (v6.14.next) structures, including enhancements for new functionality.
- Identify any unmigrated historical datasets from older systems and plan for their inclusion.

2. Data Cleansing and Normalization

- Standardize key data fields (license types, dates, names, addresses) for uniformity.
- Remove duplicates and reconcile inconsistencies to improve long-term data quality and reporting accuracy.

3. Test Migration

- Execute a test migration into a non-production environment.
- Validate results with WVBOM staff to ensure all records, historical data, and relationships appear accurately.

4. Full Data Migration and Validation

- Perform the full migration using automated tools and integrity verification scripts.
- Conduct cross-checks to confirm that all current and historical records are successfully transferred.
- Provide validation reports to WVBOM for confirmation prior to final go-live.

5. Cutover and Post-Migration Support

- Transition the upgraded environment into production with minimal downtime.
- Retain a read-only archive of legacy data (if requested) for long-term reference.
- Provide post-go-live monitoring and rapid resolution of any data issues.

Key Advantages

- **Minimal Risk:** Because WVBOM is already on the Big Picture platform, migration complexity is limited to schema updates and enhancements rather than full data conversion.
- **Preserved Historical Continuity:** All records—past, present, and future—will be maintained in one unified, secure database.
- **Enhanced Performance:** Index optimization and schema improvements in v6.14.next will significantly improve data retrieval and reporting speeds.
- **Optional Historical Data Ingestion:** If desired, older archived data that was never migrated previously can be incorporated into the new database.

Exceeding the Requirement

Big Picture Software not only ensures complete and verified data migration but also delivers a **performance-optimized, secure, and fully integrated database** that supports licensing, renewals, compliance, and document management—all in a single platform.

Summary:

Big Picture Software's proven familiarity with WVBOM's systems allows for a complete, verified, and low-risk migration to (v6.14.next). All historical data will be retained, cleansed, and optimized, ensuring WVBOM has a unified, modern database that meets current and future operational needs.

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 records changes and create reports.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.4**

- Our licensing and regulatory management system already supports **all current WVBOM license and credential types**, as WVBOM has operated on our platform for over ten years.
- With the upgrade to **v6.14 next**, the platform will retain all existing credential structures while enabling the **easy creation and implementation of future credential types and sub-types** through administrative configuration tools.
- No custom development is required for adding or modifying credential types—WVBOM staff will be able to configure new workflows via the user interface.

Robust Search, Sort, and Export Capabilities

- Staff can **search, filter, and sort records** across multiple criteria such as license type, status, renewal dates, disciplinary history, and more.
- Data exports are available in commonly used formats (CSV, Excel, PDF) for internal analysis, reporting, or sharing with external stakeholders.

- Export templates can be saved and reused, ensuring consistent and efficient data retrieval across departments.

Reporting and Record Management

- Built-in reporting tools allow WVBOM staff to **generate standard and ad hoc reports** on license applications, renewals, revenue, disciplinary cases, and other board activities.
- Reports can be customized to meet compliance requirements or board-specific needs and saved for future use.
- Record management functionality ensures accurate tracking of all changes, with a **full audit trail maintained for transparency**.

Forward Compatibility and Future-Proofing

- The database is designed to **scale with WVBOM's needs**, ensuring that as new license or credential categories are created, the system can be easily updated without costly redevelopment.
- Integration options allow credential data to interface with third-party systems (e.g., FSMB Uniform Application, VeriDoc, IMLC), ensuring seamless operations and compliance with national standards.

Summary: Big Picture Software ensures WVBOM can manage all existing license and credential types while retaining flexibility to add new categories in the future. With advanced search, sort, export, and reporting features, staff will have powerful tools to manage data efficiently, all while maintaining a secure and fully auditable system.

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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.5**.

Big Picture Software fully meets and exceeds the requirement to integrate the licensing database with the WVBOM website, ensuring that specific public information is searchable and available at no cost to the public.

Seamless Website Integration

- The upgraded system (v6.14 next) will be fully integrated with the **existing WVBOM website (<https://wvbom.wv.gov>)**.
- Public-facing features will allow the general public, credential holders, and employers to access accurate, real-time data directly from the licensing database.
- The integration eliminates duplicate data entry, ensuring **one authoritative source of truth** for all license and credential information.

- Export templates can be saved and reused, ensuring consistent and efficient data retrieval across departments.

Reporting and Record Management

- Built-in reporting tools allow WVBOM staff to **generate standard and ad hoc reports** on license applications, renewals, revenue, disciplinary cases, and other board activities.
- Reports can be customized to meet compliance requirements or board-specific needs and saved for future use.
- Record management functionality ensures accurate tracking of all changes, with a **full audit trail maintained for transparency**.

Forward Compatibility and Future-Proofing

- The database is designed to **scale with WVBOM's needs**, ensuring that as new license or credential categories are created, the system can be easily updated without costly redevelopment.
- Integration options allow credential data to interface with third-party systems (e.g., FSMB Uniform Application, VeriDoc, IMLC), ensuring seamless operations and compliance with national standards.

Summary: Big Picture Software ensures WVBOM can manage all existing license and credential types while retaining flexibility to add new categories in the future. With advanced search, sort, export, and reporting features, staff will have powerful tools to manage data efficiently, all while maintaining a secure and fully auditable system.

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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.5**.

Big Picture Software fully meets and exceeds the requirement to integrate the licensing database with the WVBOM website, ensuring that specific public information is searchable and available at no cost to the public.

Seamless Website Integration

- The upgraded system (v6.14 next) will be fully integrated with the **existing WVBOM website (<https://wvbom.wv.gov>)**.
- Public-facing features will allow the general public, credential holders, and employers to access accurate, real-time data directly from the licensing database.
- The integration eliminates duplicate data entry, ensuring **one authoritative source of truth** for all license and credential information.

Public Search Capabilities

- The system supports a **public license/credential verification tool**, enabling individuals to confirm:
 - License/registration/permit status
 - Credential type and member category
 - Work address and other approved contact details
 - Disciplinary history and malpractice actions (where applicable)
- These search features are optimized for speed, reliability, and transparency, ensuring that the public can access important information instantly.

Data Security and Privacy

- Only **authorized public data fields** will be exposed on the website, ensuring compliance with HIPAA, PII, and WVBOM's confidentiality policies.
- All sensitive or restricted data remains secured within the database, accessible only to authorized staff users.

Branding and Accessibility

- Public search results and verification pages will carry **WVBOM branding**, ensuring a professional and consistent experience for the public.
- The website integration will meet **WCAG 2.1 AA accessibility standards**, ensuring that individuals with disabilities can access public verification information without barriers.

Summary: Big Picture Software ensures that WVBOM's licensing database will be seamlessly integrated with the agency's public website. The solution provides accurate, real-time, and free access to credential verification tools, while maintaining strong security, branding, and accessibility standards.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.1.6

Big Picture Software fully meets and exceeds the requirements for a **fully integrated, customizable web-based application and renewal system** for all applicants and credential holders.

Comprehensive Online Applications and Renewals

- The proposed system (**Big Picture Software v6.14.next**) allows all current WVBOM credential types to complete their applications and renewals entirely online.

Public Search Capabilities

- The system supports a **public license/credential verification tool**, enabling individuals to confirm:
 - License/registration/permit status
 - Credential type and member category
 - Work address and other approved contact details
 - Disciplinary history and malpractice actions (where applicable)
- These search features are optimized for speed, reliability, and transparency, ensuring that the public can access important information instantly.

Data Security and Privacy

- Only **authorized public data fields** will be exposed on the website, ensuring compliance with HIPAA, PII, and WVBOM's confidentiality policies.
- All sensitive or restricted data remains secured within the database, accessible only to authorized staff users.

Branding and Accessibility

- Public search results and verification pages will carry **WVBOM branding**, ensuring a professional and consistent experience for the public.
- The website integration will meet **WCAG 2.1 AA accessibility standards**, ensuring that individuals with disabilities can access public verification information without barriers.

Summary: Big Picture Software ensures that WVBOM's licensing database will be seamlessly integrated with the agency's public website. The solution provides accurate, real-time, and free access to credential verification tools, while maintaining strong security, branding, and accessibility standards.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.1.6

Big Picture Software fully meets and exceeds the requirements for a **fully integrated, customizable web-based application and renewal system** for all applicants and credential holders.

Comprehensive Online Applications and Renewals

- The proposed system (**Big Picture Software v6.14.next**) allows all current WVBOM credential types to complete their applications and renewals entirely online.

- The system also enables **future credential types** to be added seamlessly through administrative configuration, ensuring WVBOM can adapt to new licensing needs without redevelopment.
- Applications and renewals are designed with **mobile-first compatibility**, ensuring accessibility across desktops, tablets, and smartphones.

Applicant/Credential Holder Portal

- The system includes a **secure, customizable self-service portal** accessible via the WVBOM website.
- Applicants and credential holders can:
 - o Complete and submit applications and renewals online.
 - o Upload and download required documents.
 - o Track application status in real time.
 - o Communicate securely with WVBOM staff.
 - o Receive automatic notifications and reminders for renewals, missing information, and updates.

Document Uploading and Secure Communication

- The system supports the uploading of multiple file types (PDF, DOCX, XLSX, JPEG, PNG, MP4, MOV, etc.), ensuring applicants can provide all required materials electronically.
- A **secure communication tool** allows credential holders to exchange information directly with WVBOM staff. All communications are archived to maintain a **legally sufficient and auditable record**.

Tracking, Notifications, and Transparency

- Applicants can view **real-time updates** on the status of their submissions.
- Automated email and portal notifications keep applicants informed of changes, approvals, requests for additional information, or upcoming deadlines.
- WVBOM staff can track workflows and ensure timely processing, with all actions recorded in the system's **audit trail**.

Self-Service Printing and Downloads

- Once approved, applicants and credential holders can **self-print and download** licenses, wallet cards, permits, registrations, authorizations, and certificates directly from their portal.
- Documents are generated with **WVBOM branding** and stored in the applicant's permanent record for future retrieval.

Secure eMessaging and Licensing Support

- The system includes an **integrated secure eMessaging feature** that enables **real-time, encrypted communication** between credential holders and WVBOM staff.
- All messages are **automatically archived** within the applicant's digital record to maintain a verifiable and complete communication history.
- The platform also supports **live licensing support**, allowing staff to assist applicants directly through the portal for common questions or application issues—improving responsiveness, accuracy, and user satisfaction.

- The system also enables **future credential types** to be added seamlessly through administrative configuration, ensuring WVBOM can adapt to new licensing needs without redevelopment.
- Applications and renewals are designed with **mobile-first compatibility**, ensuring accessibility across desktops, tablets, and smartphones.

Applicant/Credential Holder Portal

- The system includes a **secure, customizable self-service portal** accessible via the WVBOM website.
- Applicants and credential holders can:
 - o Complete and submit applications and renewals online.
 - o Upload and download required documents.
 - o Track application status in real time.
 - o Communicate securely with WVBOM staff.
 - o Receive automatic notifications and reminders for renewals, missing information, and updates.

Document Uploading and Secure Communication

- The system supports the uploading of multiple file types (PDF, DOCX, XLSX, JPEG, PNG, MP4, MOV, etc.), ensuring applicants can provide all required materials electronically.
- A **secure communication tool** allows credential holders to exchange information directly with WVBOM staff. All communications are archived to maintain a **legally sufficient and auditable record**.

Tracking, Notifications, and Transparency

- Applicants can view **real-time updates** on the status of their submissions.
- Automated email and portal notifications keep applicants informed of changes, approvals, requests for additional information, or upcoming deadlines.
- WVBOM staff can track workflows and ensure timely processing, with all actions recorded in the system's **audit trail**.

Self-Service Printing and Downloads

- Once approved, applicants and credential holders can **self-print and download** licenses, wallet cards, permits, registrations, authorizations, and certificates directly from their portal.
- Documents are generated with **WVBOM branding** and stored in the applicant's permanent record for future retrieval.

Secure eMessaging and Licensing Support

- The system includes an **integrated secure eMessaging feature** that enables **real-time, encrypted communication** between credential holders and WVBOM staff.
- All messages are **automatically archived** within the applicant's digital record to maintain a verifiable and complete communication history.
- The platform also supports **live licensing support**, allowing staff to assist applicants directly through the portal for common questions or application issues—improving responsiveness, accuracy, and user satisfaction.

Compliance and Security

- All online processes are secured with **role-based access controls**, encryption in transit and at rest, and full compliance with **HIPAA, PII, and WCAG 2.1 AA** accessibility standards.
- The solution ensures transparency, accessibility, and strict confidentiality for all sensitive information.

Summary:

Big Picture Software provides a **modern, fully integrated, and secure web-based application and renewal system** that allows WVBOM applicants and credential holders to complete every licensing process online with ease. With mobile compatibility, transparent workflow tracking, secure document management, and integrated eMessaging with live support, the platform not only resolves existing limitations but positions WVBOM for **future scalability, faster service delivery, and superior user experience**

4.2.1.7 *"Vendor must integrate their system with the West Virginia State Treasurer's Office (WVSTO) EGov system for the acceptance of all payments, including credit/debit card and EFT/ACH. The WVSTO will supply the Vendor with the API Information for Integration."*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.7**

Big Picture Software fully meets the requirement for processing payments, assessments, and fees, with seamless integration to the **West Virginia State Treasurer's "E-Gov" system** for electronic revenue.

Integrated Payment Processing

- The system supports **online payments for applications, renewals, fines, assessments, and other fees** directly through the applicant/credential holder portal.
- Payments are securely processed in real time, with transaction results automatically recorded in the member's licensing record.
- The platform allows for **credit card, debit card, ACH, and electronic check payments**, aligning with the Treasurer's E-Gov standards.

E-Gov System Integration

- Big Picture Software has prior experience integrating with the **WV Treasurer's Office payment gateway**, ensuring compliance with all state financial and reporting requirements.
- The integration provides automatic reconciliation of payments, ensuring that financial records in the licensing system match Treasurer's Office revenue reporting.
- WVBOM staff will not need to manually re-key or reconcile payment data across multiple systems, reducing errors and administrative workload.

Financial Reporting and Transparency

- The system generates **daily financial reports** broken down by credential type and payment category, ensuring staff can monitor revenue activity without needing to access multiple tools.

- Reconciliation reports can be exported in multiple formats (Excel, CSV, PDF) and customized to align with WVBOM's accounting and audit procedures.
- Payment and refund transactions are fully auditable, with date, time, and user information recorded for compliance and transparency.

Security and Compliance

- All payment processes are **PCI-DSS compliant** and use industry-standard encryption for transaction security.
- Sensitive payment information is not stored in the licensing database; it is managed securely through the E-Gov payment gateway.
- Audit logs ensure that all payment-related activity is transparent and verifiable.

Exceeding Requirements

- Beyond the baseline requirement of integration with the Treasurer's E-Gov system, our platform provides:
 - **Automated renewal reminders with payment links** to streamline fee collection.
 - **Self-service receipts and invoices** available through the applicant's portal.
 - **Batch reporting tools** for finance staff to simplify reconciliation with Treasurer's Office deposits.

Summary: Big Picture Software ensures that WVBOM's licensing and regulatory system will provide **secure, integrated, and compliant payment processing** through the WV State Treasurer's E-Gov system. This integration guarantees accuracy, efficiency, and transparency in revenue collection, while reducing administrative effort and improving member experience. Context (Current State): WVBOM has operated on Big Picture v6.10 for 10+ years with established configuration, data, portals, and integrations. Already exists.

4.2.1.8 The Vendor should describe the interface, capabilities and user-friendly attributes for a secure cloud-based documentation system.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.8**

Big Picture Software provides a **secure, cloud-based documentation system** that is fully integrated into the licensing and regulatory platform. The solution emphasizes ease of use, security, and efficiency for both WVBOM staff and credential holders.

Intuitive and User-Friendly Interface

- The documentation system is **web-based** and accessible through standard browsers, requiring no local software installation.
- Designed with a **modern, intuitive interface**, the system employs familiar navigation (folders, search bars, filters, dashboards) that reduces staff training requirements.
- The interface is **mobile-friendly**, ensuring staff and credential holders can access documents securely from desktops, tablets, or smartphones.

Core Capabilities

- **Secure Upload/Download:** Staff and authorized users can upload, download, and share documents with encryption in transit and at rest.
- **Advanced Search & Indexing:** The system indexes documents and metadata, enabling users to quickly locate files by name, credential type, submission date, or content tags.
- **Version Control:** Each document is versioned automatically, preserving a complete history of changes and maintaining compliance with legal record-keeping requirements.
- **Role-Based Permissions:** Access is governed by **Roles-Based Access Controls (RBAC)**, ensuring users can only view or modify documents as permitted by their role.
- **Integration with Licensing Records:** Documents are linked to the associated applicant or credential holder record, ensuring that all related information is consolidated in one place.
- **Audit Trail:** Every action—including upload, modification, access, or deletion—is logged with a timestamp and user identification, ensuring transparency and accountability.

User-Friendly Attributes

- **Drag-and-Drop Uploading:** Documents can be uploaded by dragging files directly into the system.
- **Bulk Operations:** Staff can upload multiple files at once or export document sets for board reviews.
- **Preview and Annotation:** Common file types (PDF, Word, Excel, images) can be previewed directly in the browser without downloading. Staff can annotate documents securely when reviewing applications or disciplinary cases.
- **Notifications:** Users receive alerts when documents are added, modified, or require review, streamlining workflows.
- **Accessibility Compliance:** The system is designed to meet **WCAG 2.1 Level AA standards**, ensuring all staff and applicants—including individuals with disabilities—can use the system effectively.

Security and Compliance

- The system adheres to **HIPAA and PII compliance standards**, protecting sensitive medical, personal, and disciplinary data.
- **Encryption:** All documents are encrypted in transit (TLS 1.2+) and at rest (AES-256).
- **Data Residency:** All documentation remains stored in secure, U.S.-based data centers under the control of Big Picture Software and remains the property of WVBOM.

Summary: The Big Picture secure cloud-based documentation system combines **robust functionality, strong security, and a user-friendly design**. It ensures that WVBOM staff and credential holders can easily upload, retrieve, and manage sensitive documentation while maintaining compliance with HIPAA, PII, and WCAG accessibility standards.

The new interface is similar to the existing one in that it allows staff to upload documents for meetings to folders for access by the board user so during a board meeting. The system is integrated into the document repository of database to facilitate the easy distribution of documents to the board members. Discipline, application and renewal information stored in the repository can easily be sent to folders for the board members.

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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.1.9

Big Picture Software's solution is delivered as a **secure, hosted Software-as-a-Service (SaaS) platform**, which minimizes hardware and software requirements for WVBOM. All infrastructure, hosting, and software components are managed and maintained by Big Picture Software, ensuring reliability, scalability, and seamless integration with WVBOM's website.

Core Software Components

- **Big Picture Licensing & Regulatory Management Platform (v6.14.next):** The core application supporting licensing, renewals, disciplinary case management, reporting, and compliance.
- **Database Layer:** Secure relational database optimized for regulatory and licensing workloads, fully managed and monitored by Big Picture Software.
- **Web Portal:** A responsive, web-based self-service portal for applicants, credential holders, and public searches, fully integrated into WVBOM's website.
- **Reporting and Analytics Tools:** Built-in reporting modules for ad hoc and scheduled reporting, with export to common formats and advanced data analysis capabilities.
- **Cloud-Based Documentation System:** A secure document repository with indexing, version control, and complete audit trails.

Core Hardware and Hosting Components

- **Hosting Environment:** The system is hosted in a secure, redundant, U.S.-based cloud infrastructure certified for compliance and uptime.
- **Disaster Recovery and Redundancy:** High-availability clusters and automatic failover ensure consistent service continuity.
- **Security Infrastructure:** Includes firewalls, intrusion detection and prevention systems (IDS/IPS), encryption in transit (TLS 1.2+) and at rest (AES-256), and 24/7 security monitoring.
- **Scalability:** Elastic cloud resources dynamically adjust to meet workload demands, supporting WVBOM's growth without service interruption.

Integration with WVBOM's Website

- The database and online application/renewal system are fully integrated with <https://wvbom.wv.gov>, ensuring a unified user experience and consistent branding.
- Integration supports real-time license lookup, public verification tools, and secure credential holder portals.
- APIs and secure data feeds allow for integration with external partners such as the **Federation**

of State Medical Boards (FSMB), VeriDoc, and the Interstate Medical Licensure Compact (IMLC).

Secure eMessaging and Licensing Support (exceeds specifications)

- The solution includes an **integrated secure eMessaging system** that enables **real-time, encrypted communication** between credential holders and WVBOM staff within the platform.
- All correspondence is **automatically archived** and linked to the member's digital record, maintaining a complete and auditable communication history.
- The system also supports **live licensing support**, allowing staff to respond to applicant questions and renewal inquiries directly through the portal, improving response times, accuracy, and applicant satisfaction.

Features and Functionality That Exceed Specifications

- **Future-Proof Credential Types:** Administrative users can add or modify credential types and workflows without vendor intervention.
- **Mobile-Optimized Portals:** The system exceeds standard web requirements by offering full mobile and tablet functionality.
- **Secure Messaging and Notifications:** Encrypted, in-system communication with automated email and portal notifications for application and renewal updates.
- **Self-Service License Printing:** Credential holders can securely print or download licenses, permits, and certificates directly from their portal.

Optional Services (Website Design, Hosting, and Domain Forwarding)

- Big Picture Software can **design, install, host, and manage** the WVBOM website, including domain forwarding and SSL management.
- If WVBOM prefers to retain its existing hosting environment, Big Picture Software will integrate seamlessly with the current site without requiring infrastructure changes.
- This flexibility ensures consistent branding, smooth navigation, and reliable interoperability between systems.

Summary:

Big Picture Software provides a **complete, modern, and secure licensing and regulatory platform** hosted in a U.S.-based SaaS environment. With minimal technical requirements for WVBOM, seamless integration into the existing website, built-in secure messaging and licensing support, and optional full website hosting capabilities, the solution not only meets but **exceeds** all project specifications—delivering a scalable, compliant, and future-ready system.

4.2.1.10 *Vendor should describe and provide a detailed plan and timeframe for installing and implementing the new Database and all components outlined in the specifications.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.10**

Big Picture Software proposes a **phased implementation plan over 8–12 months** to ensure a smooth transition to the upgraded licensing and regulatory management system (v6.14 next). Our plan minimizes disruption to WVBOM operations while ensuring full compliance with specifications.

Phase 1: Project Initiation (Month 1)

- **Kickoff Meeting:** Establish project governance, roles, responsibilities, and communication protocols.
- **Detailed Workplan:** Finalize project timeline, deliverables, and milestones in collaboration with WVBOM staff.
- **Environment Setup:** Provision secure hosting environments, including development, testing, and production.

Phase 2: Requirements Validation & Design (Months 1–2)

- **Requirements Workshops:** Validate all functional and technical specifications with WVBOM staff.
- **Gap Analysis:** Identify any enhancements required beyond the existing v6.14 next platform.
- **Solution Design:** Document workflows, reporting needs, and integration requirements (FSMB, VeriDoc, IMLC, etc.).

Phase 3: Database & System Configuration (Months 2–4)

- **Database Upgrade:** Migrate legacy v6.10 structures into v6.14 next.
- **Configuration:** Implement workflows, credential types, forms, reporting templates, and security roles.
- **Branding & Integration:** Configure the public portal and embed integration into the WVBOM website with branding and WCAG 2.1 AA compliance.

Phase 4: Data Migration & Validation (Months 4–6)

- **Legacy Data Migration:** Work with current provider to migrate all applicant, licensee, disciplinary, and historical records.
- **Validation Testing:** Verify integrity, accuracy, and completeness of migrated data.
- **Performance Tuning:** Optimize indexing and search capabilities to address historical concerns with data retrieval slowness.

Phase 5: Testing (Months 6–8)

- **Functional Testing:** Validate all specifications, including workflows, reporting, security, and audit trails.
- **Integration Testing:** Confirm data exchange with third-party systems (FSMB, VeriDoc, IMLC).
- **User Acceptance Testing (UAT):** WVBOM staff validate real-world scenarios prior to go-live.

Phase 6: Training & Documentation (Months 7–9)

- **Staff Training:** Conduct training sessions for WVBOM staff on administrative tools, reporting, and auditing.
- **End-User Guidance:** Provide written and video documentation for applicants and credential holders.

- **Knowledge Transfer:** Ensure WVBOM staff are capable of configuring future credential types, workflows, and reporting independently.

Phase 7: Go-Live & Support (Months 9–10)

- **Production Rollout:** Launch upgraded system with phased cutover to minimize downtime.
- **Go-Live Support:** Onsite and remote vendor staff available to assist with issues during the transition.
- **Help Desk Activation:** Provide direct support for both staff and credential holders.

Phase 8: Post-Implementation Review & Optimization (Months 11–12)

- **Stabilization Period:** Monitor performance, resolve issues, and fine-tune system configurations.
- **Post-Implementation Review:** Conduct lessons-learned session and finalize documentation.
- **Ongoing Support:** Transition fully to standard maintenance and support model.

Timeframe Summary

- **Overall Duration:** 8–12 months from contract award to full production launch.
- **Key Milestones:**
 - Kickoff: Month 1
 - Configuration & Migration Complete: Month 6
 - UAT Complete: Month 8
 - Go-Live: Month 9–10
 - Stabilization & Optimization: Months 11–12

Summary: Big Picture Software's phased installation and implementation plan ensures WVBOM's upgrade to v6.14 next is **organized, transparent, and low-risk**. With careful planning, data integrity assurance, and robust training, WVBOM will achieve a seamless transition to a modernized, fully compliant, and future-ready system.

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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.11**

Big Picture Software has successfully provided **technical support, maintenance, and ongoing improvements to WVBOM** for more than ten years. With the upgrade to version 6.14 next, WVBOM will continue to benefit from the same experienced team and proven methodologies, enhanced by new features and stronger support options.

Support Model and Help Desk Services

- **Help Desk Access:** WVBOM staff and credential holders will have direct access to our help desk via phone, email, and remote desktop support.
- **Immediate Response:** Critical issues are addressed immediately with **24/7 emergency support** for system outages or urgent issues.
- **Standard Hours Support:** Normal support requests are handled during business hours with a ticketing system to track resolution progress.
- **Remote Assistance:** Our staff can securely connect to WVBOM systems for troubleshooting and issue resolution.

Change Order and Enhancement Processing

- **Structured Change Order Process:** Any requested change (new workflows, reporting needs, form updates) follows a documented process including scope, estimate, approval, and implementation.
- **Minor Enhancements:** Small configuration changes (new credential type, form edits, reporting template updates) can often be delivered without formal coding or heavy development.
- **Major Enhancements:** Larger modifications follow formal project management and are scheduled to avoid disruption to daily operations.

Software and Hardware Support & Updates

- **Software Updates:** All patches, version upgrades, and security updates are provided to WVBOM as part of the maintenance contract. WVBOM will always have access to the most current, stable release of the platform.
- **Defect Resolution:** Any system bugs or issues identified are logged, prioritized, and remediated as part of our ongoing defect management process.
- **Hardware & Hosting:** Since the solution is hosted in a secure SaaS environment, hardware is fully managed by Big Picture Software. This eliminates the need for WVBOM to purchase or maintain dedicated infrastructure.
- **Monitoring & Performance Management:** Hosting systems are proactively monitored for uptime, speed, and security, with **99.9% availability guarantees**.

Staffing Resources and Capabilities

- **Project Manager / Account Lead:** Provides ongoing oversight, communicates regularly with WVBOM leadership, and manages change orders.
- **Support Specialists:** Handle daily requests, help desk tickets, and troubleshooting.
- **Database Administrators & Developers:** Manage data integrity, system upgrades, and custom enhancements.
- **Compliance & Security Staff:** Ensure that HIPAA, PII, and WCAG requirements are met continuously.

Commitment to Long-Term Partnership

- Our support team has worked with WVBOM staff for more than a decade, and this continuity ensures that we understand both the technical environment and the operational needs of the Board.
- With the v6.14 next platform, WVBOM will benefit from **more robust features, streamlined workflows, and an improved support framework** that maintains the same reliable partnership the Board has come to trust.

Summary: Big Picture Software provides a **proven, stable, and fully staffed support model** for WVBOM, including help desk services, change order processing, defect management, software and hardware support, and ongoing updates. With over 10 years of successful partnership and the same dedicated support team, WVBOM can be confident in receiving consistent, high-quality maintenance and support for the life of the contract. Support: SLAs unchanged; standard release cadence; change orders only for net-new functionality. New primary support person available upon request.

4.2.1.12 *Vendor should describe its process for training WVBOM staff on the new system.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.1.12**

Big Picture Software has provided support and training for WVBOM staff for more than a decade. With the transition to **version 6.14 next**, we will continue that tradition by offering a structured, hands-on training program designed to ensure that WVBOM staff are confident and fully capable of operating the modernized system.

Training Approach and Methodology

- **Role-Based Training:** Training will be tailored to the roles of WVBOM staff, such as administrators, licensing staff, finance users, and IT support. Each group will receive instruction specific to their daily functions.
- **Hands-On Sessions:** Training will be delivered in an interactive, hands-on format so staff can practice using the system in a training environment before go-live.
- **Phased Training:** Training will be staged to align with the implementation phases (applications, renewals, reporting, disciplinary, portal, etc.), ensuring staff are trained just prior to using new functionality.
- **Knowledge Transfer:** Staff will learn how to configure forms, credential types, workflows, and reports without vendor coding, ensuring long-term independence.

Training Delivery Methods

- **Onsite Training:** If requested, our trainers will conduct live, in-person sessions at WVBOM offices.
- **Virtual Training:** Online training via secure video conferencing will be available for remote or follow-up sessions.

- **Recorded Sessions:** Training sessions will be recorded and made available to staff for ongoing reference.
- **Documentation:** Comprehensive user manuals, quick reference guides, and role-specific cheat sheets will be provided.

Training Schedule and Timeline

- **Initial Training (Months 6–8):** Conducted during User Acceptance Testing (UAT), allowing staff to practice in the nearly finalized environment.
- **Go-Live Training (Month 9–10):** Focused refresher sessions provided prior to go-live, ensuring confidence at launch.
- **Post-Go-Live Support (Months 11–12):** Supplemental sessions and Q&A clinics to reinforce training and answer real-world questions.

Ongoing Training and Support

- **Refresher Training:** Available on request to address staff turnover or new functionality.
- **Help Desk Support:** Staff may contact the help desk for one-on-one assistance with specific tasks.
- **Continuous Learning:** Updated documentation and training modules will be provided as new features or upgrades are released.

Summary: Big Picture Software will provide **role-specific, hands-on training backed by documentation, recordings, and ongoing support**. By integrating training into the implementation timeline and offering both live and virtual options, WVBOM staff will be fully prepared to adopt the modernized system with confidence and efficiency.

Training (delta-focused): Since staff already use Big Picture, training targets what's new in 6.14 next: refined workflows, UI updates, new reporting features, and any policy changes. We provide concise 'What's New' guides, short videos, and role-based labs. Train-the-trainer ensures continuity for future onboarding.

***4.2.2. Mandatory Project Requirements:** The following mandatory requirements relate to the goals and objectives and must be met by the Vendor as a part of its submitted proposal. The Vendor should describe how it will comply with the mandatory requirements and include any areas where its proposed solution exceeds the mandatory requirement. Failure to comply with mandatory requirements will lead to disqualification, but the approach/methodology that the vendor uses to comply with, and areas where the mandatory requirements are exceeded, will be included in technical scores where appropriate. The mandatory project requirements are listed below.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2**

Big Picture Software acknowledges that the following requirements are **mandatory** for this project and must be satisfied to ensure compliance with the RFP. We confirm that our proposed solution (v6.14 next) not only meets each requirement but, in many cases, **exceeds** them through enhanced functionality, proven reliability, and scalability for future needs.

Compliance with All Mandatory Requirements

- **System Implementation:** The licensing database and all components will be fully implemented, tested, and operational within the required **18-month timeframe**. Our established **8–12-month project plan** demonstrates our ability to meet this requirement well in advance of the maximum timeframe.
- **Database Functionality:** The platform will store, manage, and index licensing, renewal, disciplinary, and historical data, ensuring that WVBOM has a **single source of truth** for all records.
- **Integration with WVBOM Website:** Public verification tools and credential holder portals will be fully integrated into the WVBOM's existing website and compliant with **WCAG 2.1 AA accessibility standards**.
- **Security & Compliance:** The system is HIPAA- and PII-compliant, with **encryption, audit trails, and role-based access controls**. We can provide **third-party documentation** verifying compliance upon request.
- **Scalability:** The solution will handle **all current credential types** and is designed to allow staff to add new license or credential categories **without vendor coding**, ensuring long-term flexibility.
- **Cloud-Based Documentation:** A secure document management system will allow uploading, indexing, and storing of all required file types, with role-based access and audit trail functionality.
- **Support & Maintenance:** Ongoing maintenance, software upgrades, defect remediation, and help desk support are included for the life of the contract.

Areas Where We Exceed Requirements

- **Proven Experience:** We are not offering a new or untested product. WVBOM has successfully used our platform for more than **10 years**, and this project is an **upgrade** rather than a replacement, significantly reducing risk.
- **Faster Delivery:** While the RFP allows 18 months, our project will be implemented in **8–12 months**, giving WVBOM faster access to the upgraded functionality.
- **Enhanced Transparency:** Applicants and licensees will benefit from **real-time dashboards, automated notifications, and self-service license printing**, features that go beyond the baseline requirements.
- **Future-Proofing:** Our platform is designed with **API-ready architecture**, allowing integration with new systems and standards (e.g., FSMB, IMLC, VeriDoc) as regulatory needs evolve.
- **User-Friendly Design:** The portal and documentation system are fully **mobile-friendly**, ensuring access on all modern devices without additional development.

Summary: Big Picture Software meets every **mandatory requirement** specified in Section 4.2.2 and exceeds many of them by providing a proven, modernized platform that is already familiar to WVBOM staff, highly secure, fully compliant, and scalable for the future.

Compliance Summary: All mandatory requirements remain satisfied under the upgraded version; validation occurs in UAT with a traceability matrix.

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.*

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.

The Database must be able to store and provide member data for historical recordkeeping, management, data-mining, and reporting purposes.

The Database should provide for document and data repository capability and indexing capability to store 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.

The solution should be integrated into the WVBOM's website (currently <https://wvbom.wv.gov>) to allow for detailed real-time verification capabilities to provide an online search feature that can be utilized by the public to obtain a license/registration/permit holder's ("Members") authorization status(es), member type(s), malpractice history, work address, or other such categories, and includes the ability for disciplinary documents to be viewed through the website.

The Database should provide the ability to add new Member types, credential types and/or sub-types as needed.

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 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 maintain a legally sufficient record of any communications for each member.

The solution should provide for WVBOM branding into screens, webpages, reports, documents, printed licenses, certifications, permits, letters and email correspondence.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.2.1

The West Virginia Board of Medicine (WVBOM) already operates on the Big Picture Software licensing and regulatory management platform. The proposed project will upgrade WVBOM from version 6.10 to 6.14 next, which includes an enhanced, modernized SQL Server-based database architecture and a fully web-based application interface. This approach ensures continuity of data, staff familiarity, and integrations, while eliminating dependence on desktop client hardware or software.

Database Implementation and Timeline

- The upgrade will be delivered as an in-place modernization project, ensuring that all current data, configurations, and workflows remain intact.

- A fully developed, implemented, and operational solution will be delivered within a 8–12-month implementation window, well inside the 18-month maximum specified.
- A parallel TEST/UAT environment will be established to validate configuration, data integrity, and performance before production cutover.

Legacy Data Migration

- All data from WVBOM's existing v6.10 database will be upgraded in place, preserving historical records, member files, disciplinary records, and supporting documents.
- Our team has over a decade of experience migrating state board data, including large volumes of structured and unstructured records.
- Should collaboration with third-party vendors be required, Big Picture will coordinate to ensure seamless ingestion of any supplemental datasets.

Data Storage, Repository, and Historical Records

- The upgraded solution provides a document and data repository with indexing for applications, renewals, disciplinary records, malpractice records, and supporting documentation.
- This repository replaces the need for separate paper or external electronic archives and ensures WVBOM retains full ownership of all information.
- Historical data is preserved with archival and retention policies configurable to agency requirements.

Website Integration and Public Verification

- The solution integrates directly with the WVBOM's website (<https://wvbom.wv.gov>) to provide a real-time license verification portal.
- Public users can search by name, credential type, or license number to verify authorization status, work address, malpractice history, and disciplinary actions.
- Disciplinary documents, when authorized, are available for direct public viewing via the website.

Flexibility for Credential and Member Types

- New member types, credential types, and sub-types can be added through administrative configuration tools without custom development.
- This ensures scalability as regulatory needs evolve.

Security and Access Controls

- The platform enforces Role-Based Access Control (RBAC), limiting functions and data access by role on a strict need-to-know basis.
- Staff access is managed through secure web portal dashboards with audit logging of all actions.
- The solution complies with HIPAA, ADA/WCAG 2.1, and state security standards, including encryption at rest and in transit.

Communication and Notifications

- Authorized staff can generate targeted or bulk email communications to licensees or cohorts, with no character limitations.
- All communications are logged and retained in each member's record to provide a legally sufficient audit trail.

Branding and Customization

- The solution supports WVBOM branding across all screens, reports, certificates, licenses, permits, and email correspondence, ensuring professional consistency and alignment with agency standards.

External Integrations and APIs

- Big Picture supports API-based integrations to enrich member records with third-party data. This includes:
 - VeriDoc for license portability and verification.
 - Federation of State Medical Boards (FSMB) Uniform Application for Licensure.
 - Interstate Medical Licensure Compact Commission.
- Additional APIs can be configured to support future integration needs.

Summary: The upgraded Big Picture v6.14 next database solution fully meets and exceeds the requirements of specification 4.2.2.1. It preserves all existing data, introduces modern web-based access, ensures robust security and reporting, integrates with WVBOM's public website, and provides the flexibility, scalability, and compliance required for the Board's long-term mission.

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 programming to accommodate.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.1.1**

The Big Picture Software platform (v6.14 next) provides a comprehensive task and workflow management system that allows WVBOM staff to efficiently manage licensing, disciplinary, and administrative processes without reliance on custom code or vendor intervention.

Workflow and Task Creation

- Staff can create automatic and ad-hoc tasks triggered by application events, renewals, complaints, or user-defined criteria.
- Ad-hoc tasks can be generated manually at any time to support unique case handling or non-standard processes.

User Assignment and Templates

- Tasks can be assigned to individual staff members or workgroups, with role-based permissions ensuring assignments follow appropriate responsibility lines.

- Staff can build and reuse task templates for recurring workflows (e.g., application reviews, investigation steps, compliance checks), minimizing repetitive effort.

Customizable Workflows

- WVBOM administrators can design and modify workflows directly through the user interface using configuration tools.
- This eliminates the need for custom development, coding, or programming, while allowing the Board to adapt quickly to legislative or policy changes.
- Conditional logic supports branching processes

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 solution should allow staff to pull a random percentage of applicants or license holders from the database for auditing purposes.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.1.2**

The Big Picture Software platform (v6.14 next) includes a auditing framework that ensures accountability, transparency, and traceability of all data and document interactions within the WVBOM system.

Document Audit Trails

- Every scanned, uploaded, stored, archived, and retrieved document is automatically logged in the system.
- The audit trail captures the user ID, timestamp, action type, and associated record for each event.
- Historical audit reports can be generated on demand to demonstrate compliance with regulatory, legal, and internal review standards.
- Audit logs are immutable and cannot be altered or deleted by staff, ensuring integrity.

Data Change Auditing

- All changes to structured data (e.g., license records, application fields, disciplinary notes) are recorded in a transactional audit record.
- Each change log includes the user making the change, the date and time of the change, the field altered, and the before-and-after values.
- Historical views allow administrators to roll back or compare records over time for investigative or compliance purposes.

Randomized Audits of Records

- The solution provides functionality to select a random percentage of applicants or licensees from the database.
- This feature supports routine or targeted audits, quality assurance, and compliance monitoring.

- The random selection process is system-driven, ensuring fairness, consistency, and avoidance of manual bias.

Reporting and Oversight

- Staff and administrators can generate detailed audit reports filtered by date, user, action type, or record type.
- Reports can be exported to CSV, XLSX, or PDF for archival or external review.
- Configurable dashboards allow compliance officers to monitor recent activity, exceptions, and anomalies in real time.

Summary: The upgraded Big Picture solution fully meets the requirements of 4.2.2.1.2 by providing comprehensive document and data audit trails, secure user-level logging, random audit sampling of member records, and flexible reporting. This ensures WVBOM maintains complete visibility and accountability across all licensing, disciplinary, and administrative activities.

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 Database should allow for daily financial reports of revenue collection broken down by member types as well as totals to prevent staff from needing to access multiple tools to verify payment information.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.1.3**

The Big Picture Software platform (v6.14 next) includes an advanced reporting engine designed to provide WVBOM staff with **real-time visibility**, **flexibility**, and **control** over licensing and financial data. The reporting module supports both day-to-day operational needs and long-term compliance oversight.

Member Status Management

- Staff can generate reports at **any point in the application or renewal process** to view member status, deficiencies, and pending approvals.
- Configurable search and sort options enable staff to quickly filter applicants or licensees by status, credential type, or renewal cycle.
- Saved queries allow frequently used reports to be run with a single click, improving staff efficiency.

Financial Reporting

- The system produces **daily financial reconciliation reports**, broken down by member type, fee category, and transaction totals.
- Revenue data is automatically linked to member records, eliminating the need to reconcile across multiple systems.

- Staff gain a clear, auditable view of collections, refunds, and adjustments, supporting both operational accounting and external audits.

Customized Reporting and Templates

- Authorized staff can access **all database fields** to build customized reports without requiring vendor involvement.
- Custom report templates can be created, saved, and reused across different datasets or record sets, enabling consistency across departments.
- Reports are exportable to **CSV, XLSX, and PDF** formats for sharing and archival.

Communication and Form Letters

- The reporting module integrates with **correspondence tools** to generate form letters or email notices directly from report results.
- Staff can quickly notify applicants or licensees of their current status, renewal reminders, or other Board communications.
- Each communication is stored in the member's record to maintain a **legally sufficient audit trail**.

Transparency and Oversight

- Reports can be scheduled and automatically distributed to designated staff or leadership.
- Dashboards provide a **real-time snapshot** of applications in progress, renewals completed, and financial collections.
- This ensures WVBOM leadership and staff have clear, actionable insights to support decision-making.

Summary: The upgraded reporting features in Big Picture v6.14 next fully meet the requirements of **4.2.2.1.3** by providing comprehensive search, sort, export, and reporting capabilities. The solution enables customized, reusable report templates, robust financial reconciliation, and integrated communications, ensuring WVBOM can manage member status, revenue, and outreach efficiently and transparently.

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 for up to 500 complaints per year.*

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 should include an auto generated date tracking ability.

The system should allow the ability to store documents, videos, and audio files with each case.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.1.4**

The Big Picture Software platform (v6.14 next) provides a dedicated complaints and disciplinary case management module that enables WVBOM to effectively manage the full lifecycle of complaints, investigations, and enforcement actions.

Complaint Intake and Tracking

- Complaints may be recorded manually by staff, submitted through an online form, or imported from external sources.
- Each complaint is assigned a unique case number and is tracked from intake through resolution.
- The system allows classification of complaints by type, source, and severity, enabling WVBOM to manage high-volume caseloads (up to and exceeding 500 complaints annually).

Investigations and Outcomes

- Staff can open formal cases, assign investigators, and define action steps using configurable workflows.
- The system provides deadline and timeframe tracking, with automated reminders and escalation alerts to ensure timeliness.
- Outcomes (dismissed, resolved, disciplinary action, referral) are recorded and linked to the corresponding licensee/member record.

Historical Retention

- All complaint and disciplinary history is retained indefinitely, or subject to WVBOM-defined retention rules.
- This ensures compliance with legal and archival requirements while providing investigators with full context of prior complaints or disciplinary actions.

Auto-Generated Date Tracking

- The solution automatically records and displays all key dates associated with complaints, including intake date, assignment date, deadlines, and resolution date.
- This supports compliance with statutory and policy-driven timeframes.

Document and Media Storage

- Each case record can securely store supporting documents, images, audio recordings, and video evidence.
- Files are indexed and searchable, ensuring investigators and board staff have quick access to relevant evidence.
- All stored materials are logged in the audit trail, ensuring authenticity and accountability.

Reporting and Oversight

- WVBOM staff can generate reports on open complaints, resolution timelines, disciplinary outcomes, and workload distribution.

- Reports can be customized, saved, and exported in multiple formats to support management, board reporting, and public transparency requirements.

Summary: The Big Picture v6.14 next case management solution meets and exceeds the requirements of 4.2.2.1.4 by providing comprehensive intake, investigation, disciplinary tracking, historical retention, automated deadline management, and robust reporting. The system empowers WVBOM to efficiently manage up to 500 complaints annually while ensuring transparency, accountability, and compliance with retention policies.

4.2.2.1.5. Payment: "Vendor must integrate their system with the West Virginia State Treasurer's Office (WVSTO) EGov system for acceptance of all payments, including credit/debit card and EFT/ACH. The WVSTO will supply the Vendor with the API information for integration. Vendor must be able to include fee receipts within member's corresponding records."

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.1.5**

Context (Current State): WVBOM has operated on Big Picture v6.10 for 10+ years with established configuration, data, portals, and integrations with the **WV State Treasurer's "E-Gov" system**.

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 content. The cloud-based program should not allow for documentation to be printed off or locally stored on a machine or device. The program should permit:

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.2**

The Big Picture Software platform (v6.14 next) includes a fully integrated, secure cloud-based documentation management system that allows WVBOM staff and licensees to access and manage records with minimal steps, while ensuring compliance, security, and confidentiality.

Secure Cloud Documentation

- All documentation is stored in a cloud-hosted repository with encryption at rest and in transit.
- Access is controlled via role-based permissions, ensuring that staff, licensees, and public users see only the documents appropriate to their role.
- The interface is designed for efficiency, requiring minimal steps for staff to locate, upload, or review documents.

Access Control and Restrictions

- By policy and configuration, the solution can be set to prohibit local saving or printing of sensitive documentation, supporting WVBOM's confidentiality and security requirements.
- When enabled, documents remain view-only within the secure portal, preventing unauthorized duplication or distribution.

- Administrators can configure additional restrictions such as watermarks, expiration controls, and multi-factor authentication for sensitive files.

Integrated Program Features

The cloud-based documentation module provides:

- **Centralized Storage:** All documents are stored in a single repository linked to member records.
- **Advanced Indexing and Search:** Metadata and content-based indexing allow staff to find documents quickly.
- **Document Versioning:** Each document maintains full version history, ensuring that changes are tracked and prior versions remain available.
- **Audit Trails:** All document uploads, updates, and retrievals are logged by user, date, and time for accountability.
- **Scalability:** Capable of handling all WVBOM licensing, disciplinary, and complaint-related documentation indefinitely, subject to retention rules.

Usability

- The documentation system is fully web-based, requiring no client installations or local dependencies.
- WVBOM staff can access records securely from any authorized device with an internet connection.
- The user interface is designed to mirror familiar file management conventions, reducing training requirements.

Summary: The Big Picture v6.14 next solution provides WVBOM with an integrated, secure, cloud-based documentation system that minimizes access steps, enforces restrictions on printing and local storage, and supports centralized storage, auditing, indexing, and scalability. This ensures both staff efficiency and compliance with confidentiality and retention standards.

***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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.2.1**

The Big Picture Software platform (v6.14 next) provides an **integrated secure portal** that enables WVBOM staff and board members to exchange confidential documents with authorized third parties in full compliance with privacy and security requirements.

Secure Document Exchange

- Staff and board members can upload and send sensitive files to third parties such as investigators, credentialing organizations, or partner agencies.
- Third-party recipients are granted **secure accounts with multi-factor authentication (MFA)** to access only the materials designated for them.

- All documents remain encrypted during transmission and while stored in the portal, ensuring end-to-end confidentiality.

User Accounts and Access Controls

- Each WVBOM staff member and board member has a secure account provisioned with **role-based permissions**.
- Administrators can create and manage accounts for third parties with granular control over access rights.
- Access can be limited to a **specific workspace, case file, or document**, ensuring third parties only see what has been explicitly shared with them.

Workspace and Document-Level Restrictions

- Workspaces allow for controlled collaboration on cases or projects while maintaining strict segregation of unrelated records.
- Individual documents or files may be restricted to one or more designated users, preventing broader access.
- All access is tracked through the system's **audit trail**, recording the user, date, and time of every view, download (if permitted), or upload.

Ease of Use

- The portal interface is fully **web-based**, requiring no software installation or local storage of files.
- Users access documents via secure login and intuitive dashboards, minimizing training requirements while ensuring compliance.
- Notifications and alerts keep staff informed when new documents are shared or when access permissions change.

Summary: The upgraded Big Picture v6.14 next solution fully meets the requirements of **4.2.2.2.1** by providing WVBOM with a secure, role-based document portal. It allows staff and board members to safely exchange confidential information with authorized third parties while maintaining strict access controls, audit trails, and encryption to protect sensitive data.

***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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.2.2**

The Big Picture Software platform (v6.14 next) fully supports the ability for WVBOM staff and board members to securely **upload and manage documents, images, and multimedia files** without additional user license costs.

Unlimited User Access

- All authorized WVBOM staff and board members will have access to upload and manage documents at **no additional licensing cost**.

- Accounts are managed through role-based access control, ensuring that each user can securely upload files within their scope of responsibility.

Supported File Types

- The platform natively supports common file formats required for regulatory, investigative, and administrative operations, including:
 - **Documents:** PDF, DOC, DOCX, XLSX
 - **Images:** PNG, JPEG
 - **Audio/Video:** MP4, MOV
- The system is extensible, allowing additional file types to be enabled if needed in the future.

Secure Uploads and Storage

- All files are uploaded via a **secure, encrypted connection** and stored in the cloud-based repository.
- Uploaded files are automatically linked to the appropriate case, member record, or workflow item for easy retrieval.
- File uploads are logged in the audit trail, recording the user, date, time, and associated record for accountability.

Usability and Efficiency

- Uploads can be performed directly from the web-based user interface with minimal steps.
- Drag-and-drop functionality simplifies the process of attaching documents and multimedia files.
- Version control ensures that updated files are stored without overwriting historical versions, preserving the complete record.

Summary: The Big Picture v6.14 next solution fully satisfies the requirements of 4.2.2.2.2 by allowing WVBOM staff and board members to upload and manage documents, images, and multimedia files across a wide range of formats, at no additional license cost. Secure storage, auditing, and version control ensure both ease of use and compliance with regulatory standards.

4.2.2.2.3 *All uploaded documents, videos, audio files, etc. should be viewable within the portal without system delay.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.2.3**.

Seamless, Real-Time File Access

The upgraded Big Picture (v6.14.next) platform enables **instant, in-portal viewing of all uploaded documents, videos, audio files, and images** without the need for downloading or opening separate applications. Users can preview files securely and immediately after upload.

Performance and Optimization

- The system uses **asynchronous file rendering** and **caching optimization** to ensure that documents load quickly and efficiently.
- Common file formats—including PDF, DOC/DOCX, XLS/XLSX, JPEG, PNG, MP4, and MOV—are fully supported for in-browser viewing.
- Video and audio files stream directly from the secure cloud storage, using adaptive bitrate streaming to eliminate playback delays or buffering.

Integration with Cloud Documentation System

- All uploaded files are stored within the **integrated cloud-based documentation program**, ensuring seamless linkage to the relevant member record and application.
- Files are automatically indexed, tagged, and associated with specific workflows or credentials.
- Both staff and authorized members can preview files instantly from the portal or back-office workspace.

Security and Compliance

- Viewing sessions occur entirely within the secure portal—no files are cached locally on user devices.
- Access is controlled through **role-based permissions**, ensuring only authorized staff or members can view specific files.
- All data transfers are encrypted in transit (TLS 1.2+) and at rest (AES-256), maintaining full HIPAA and PII compliance.

Exceeding Requirements

- **Instant Preview:** No manual refresh or download required; users can view files inline.
- **Audit Logging:** Every access and view event is logged for compliance.
- **User Experience:** Mobile-optimized design ensures that documents and videos are easily viewable on smartphones and tablets without additional software.

Summary:

Big Picture Software's platform ensures that all uploaded files—including documents, videos, and audio—are instantly viewable within the portal with no system delay. The design emphasizes speed, security, and accessibility while exceeding WVBOM's performance and compliance requirements.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.2.3

Big Picture Software will provide WVBOM with a **fully integrated, modernized website portal** that seamlessly connects to the upgraded licensing database (v6.14 next) and the secure cloud-based documentation program. The portal will be accessible directly through the existing WVBOM website (<https://wvbom.wv.gov>) and designed for ease of use, accessibility, and real-time accuracy.

Seamless Integration

- The portal is **natively integrated** with the database, ensuring that all application and renewal data flows directly into member records without duplicate entry.
- Integration with the **cloud-based documentation program** allows applicants and credential holders to securely upload, download, and track documents that are tied directly to their applications.
- Automated synchronization ensures that WVBOM staff always work from a **single source of truth**.

Core Capabilities

- **Application & Renewal Management:** Credential holders of all license and credential types can complete the full application and renewal process online.
- **Document Handling:** Users can upload required documentation, while staff can review, store, and manage them in the secure cloud repository.
- **Notifications & Tracking:** The portal includes built-in status tracking and automated email notifications to keep applicants and licensees informed in real-time.
- **Licensee Self-Service:** Once approved, members can securely **self-print or download licenses, wallet cards, and authorizations**.
- **Secure Communications:** Provides a secure channel for credential holders to correspond with WVBOM staff regarding applications, renewals, or compliance matters.

User-Friendly & Accessible

- The portal is **mobile-responsive**, ensuring full functionality on desktops, tablets, and smartphones.
- WCAG 2.1 AA accessibility standards are met, ensuring usability for individuals with disabilities.
- Branding will align with WVBOM's existing public site for a **professional, consistent user experience**.

Superior Approach

Unlike standalone solutions, Big Picture Software's platform ensures the **portal, database, and documentation system are all parts of a unified solution**. This reduces staff burden, avoids the risk of synchronization errors, and ensures accurate, real-time data for both staff and credential holders.

Summary: Big Picture Software's integrated website portal delivers a secure, mobile-ready, and user-friendly system that connects seamlessly with the database and cloud documentation platform. It enables WVBOM to streamline application and renewal processes, improve transparency, and provide credential holders and staff with modern tools for efficient service delivery. Integration is key and will happen seamlessly.

4.2.2.4 *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.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.2.4

Big Picture Software's upgraded platform will provide the WVBOM with a **secure, web-based portal** accessible through the agency's website. This portal will empower members to complete licensing tasks without cost to them, while giving WVBOM staff **full administrative oversight and control** over all submitted data, documents, and actions.

Secure Member Access (No Cost to Members)

- All credential holders (MDs, DPMs, PAs, and future types) will have secure access to the portal at no additional cost.
- Members can perform licensing activities including:
 - Completing new applications and renewals.
 - Uploading required documents, photos, or supporting materials.
 - Checking the real-time status of their applications or licenses.
 - Downloading and self-printing licenses, wallet cards and authorizations.
 - Communicating securely with WVBOM staff via encrypted messaging.
- The system is **mobile-responsive** and WCAG 2.1 AA compliant, ensuring accessibility on all devices and for individuals with disabilities.

Administrative Access for WVBOM Staff

- WVBOM staff will have full oversight and management capabilities for all portal actions, including:
 - Reviewing and approving or denying applications, renewals, or submitted documents.
 - Editing or holding applications as needed.
 - Managing member-submitted changes to contact information, ensuring they are verified and approved before becoming official.
 - Overriding or reissuing license or certificates when required.
 - Generating activity and compliance reports tied to portal usage.

Security & Compliance Features

- Role-based access ensures that staff and members only see functions appropriate to their permissions.
- All actions are tracked in an **audit trail** that records the user, timestamp, and change made.
- Portal data is encrypted in transit and at rest, supporting HIPAA and PII compliance.

Advantages of Our Approach

- **Unified Integration:** The portal ties directly into the database and cloud-based documentation program, ensuring real-time synchronization and eliminating duplicate entry.

- **Reduced Staff Burden:** By allowing members to self-service for renewals, document uploads, and license printing, WVBOM staff can focus on higher-value regulatory and compliance work.
- **Continuity of Service:** Since WVBOM has operated on our system for over 10 years, this upgrade minimizes risk and disruption while delivering modern functionality.

Summary: Big Picture Software's member portal provides secure, no-cost functionality for credential holders while giving WVBOM staff full oversight and control. The portal integrates seamlessly with the upgraded database and documentation system, enhancing efficiency, compliance, and transparency.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.1**

The Big Picture Software platform (v6.14 next) provides WVBOM with a **secure, web-based member portal** that supports all credential types, enabling applicants and licensees to manage their relationship with the Board through a centralized self-service environment.

Centralized Dashboard

- Members access a **single dashboard** that consolidates:
 - Real-time application and renewal status.
 - License/credential history with the WVBOM.
 - Any pending deficiencies or required actions.
- The dashboard updates in real time, ensuring applicants and licensees always have current information about their standing.

Application and Renewal Processing

- The system supports **digital applications and renewals** for all credential types managed by the WVBOM.
- Members may submit applications, upload supporting documentation, and pay fees online through a secure payment gateway.
- Renewal workflows are automated, providing reminders, notifications, and tracking to reduce staff intervention and applicant delays.

Member Self-Service Features

- Members can **log in securely** via multi-factor authentication and role-based credentials.
- From their record, members may:
 - View current and past licenses and certifications.
 - Access their full historical record with the Board.
 - Print or download copies of official correspondence generated by the WVBOM (letters, receipts, deficiency notices, renewal confirmations, etc.).

- The portal reduces call and email volume to staff by allowing licensees to answer many status questions independently.

Integration and Transparency

- All portal activity is synchronized with the core WVBOM database, ensuring staff and members view the same authoritative record.
- Communications and notices sent through the portal are logged and stored with the member's record, maintaining a **complete and auditable history**.
- The system is fully **mobile responsive**, allowing applicants and licensees to access the portal from desktops, tablets, or smartphones.

Summary: The Big Picture v6.14 next self-service portal fully meets the requirements of **4.2.2.3.1** by delivering a secure, user-friendly, and centralized dashboard for applications, renewals, historical records, and Board correspondence. This reduces administrative overhead while empowering members with transparency and real-time access to their licensing status.

***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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.2**

The Big Picture Software platform (v6.14 next) provides a **secure, standards-based authentication system** to protect WVBOM member accounts while ensuring ease of use.

Email-Based Login

- Members can use their **email address as their unique username**, reducing account confusion and eliminating the need for separate ID numbers for login.
- Email login simplifies account recovery processes and aligns with industry best practices for user authentication.

Customizable, Secure Passwords

- Members set their own passwords during registration or onboarding.
- The platform enforces configurable **password complexity requirements**, including:
 - At least **eight (8) characters in length**.
 - At least **one (1) uppercase letter**.
 - At least **one (1) number**.
 - At least **one (1) special character or symbol**.
- Passwords are stored using **modern hashing algorithms and salting techniques**, never in plain text.

Security and Compliance

- WVBOM administrators may configure additional authentication rules (e.g., password expiration intervals, lockouts after failed login attempts, or MFA options).

- The system supports **self-service password resets** via email verification, reducing staff workload while maintaining security.
- Authentication and access control logs are captured in the audit trail, ensuring transparency and accountability.

Member Experience

- Members can securely log in from desktops, tablets, or smartphones through the **responsive web-based portal**.
- The login page can be **branded with WVBOM's logo and style**, maintaining a professional and consistent look.
- The balance of usability and security ensures smooth access while protecting sensitive information.

Summary: The Big Picture v6.14 next solution fully satisfies **4.2.2.3.2** by providing members with secure email-based login, customizable strong passwords, and flexible authentication policies. This ensures that WVBOM member records remain protected while delivering a straightforward and user-friendly login experience.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.3**

The upgraded Big Picture Software platform (v6.14 next) will provide WVBOM members with **secure and flexible account management tools** for updating login credentials, while ensuring compliance with best practices in authentication and account security.

Username & Password Management

- **Username (Email) Updates:** Members will be able to securely update or change their username (email address) within the portal after logging in. This change will be verified through a confirmation process to ensure accuracy and prevent unauthorized changes.
- **Password Updates:** Members may update their password at any time after login, with system-enforced password complexity rules:
 - Minimum of eight (8) characters
 - At least one (1) uppercase letter
 - At least one (1) number
 - At least one (1) symbol

Secure Retrieval and Reset System

- A **self-service password reset feature** is included, allowing members to request a secure reset link delivered to their registered email address.
- Reset links are **time-bound**, expiring after a defined window (e.g., 24 hours), to prevent misuse.
- Additional safeguards include:

- CAPTCHA or multi-factor validation for reset requests
- Logging of reset attempts in the system's audit trail
- Prevention of reuse of expired or invalid links

Email Uniqueness and System Safeguards

- The system enforces a strict **unique email address policy**: no two accounts can share the same email.
- Administrative staff will have oversight tools to resolve conflicts (such as members attempting to register with a duplicate email) while maintaining data integrity.

Security and Compliance Advantages

- All credential changes are stored in the **audit trail**, showing who made the change, when it was made, and from what IP/location.
- Encryption ensures that passwords are never stored in plain text.
- This approach aligns with **HIPAA, PII protection standards, and industry best practices for identity management**.

Summary: The proposed system ensures members can securely update their email (username) and password, provides a robust password reset system, and prevents duplicate emails. These features protect WVBOM's data integrity while delivering a user-friendly, modern experience for members.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.4**

The Big Picture Software platform (v6.14 next) provides a **secure, user-friendly system** for managing and verifying member contact information while ensuring WVBOM staff retain oversight and approval authority.

Address Verification and Uniform Formatting

- The portal employs an **address verification tool** that validates addresses against standard postal formats, reducing errors and ensuring mail deliverability.
- Telephone number fields, email addresses, and other standardized data types are formatted consistently to maintain uniform records across the database.
- Real-time validation prevents entry of incomplete or improperly formatted information.

Member Self-Service Updates

- Members may securely update their contact information online, including:
 - Primary and secondary addresses.
 - Telephone numbers.

- Email addresses.
- Changes are submitted through the portal, linked directly to the member's record, and flagged for staff review.

WVBOM Staff Oversight

- All submitted updates are routed into a **review and approval workflow**, ensuring changes do not take effect until verified by authorized staff.
- Staff can accept, modify, or reject updates, with their actions recorded in the system audit log.
- This prevents fraudulent or mistaken changes from being immediately applied to official records.

Change History and Audit Trails

- Every modification to member contact information is automatically logged, including:
 - The **user initiating the change**.
 - The **date and time** of the change.
 - The **original and updated values**.
- Historical records remain available for compliance, investigations, and quality assurance.

Summary: The Big Picture v6.14 next solution fully satisfies the requirements of **4.2.2.3.4** by enabling members to update their contact information online, enforcing address and data format validation, and providing WVBOM staff with full review and approval authority. Complete audit trails guarantee accuracy, transparency, and accountability for every change.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.5**

The Big Picture Software platform (v6.14 next) provides WVBOM staff with **complete administrative access and oversight** of all applications and documentation submitted by members. This ensures that the Board maintains full control of approvals, denials, and compliance with statutory and regulatory requirements.

Review and Approval Workflow

- All applications and uploaded documents are automatically routed to the **staff review queue** before final processing.
- Staff may review, annotate, and verify documentation within the portal.
- No application or supporting document advances to approval until explicitly validated by authorized personnel.

Administrative Controls

- Designated staff have **tiered levels of administrative access** based on role (e.g., intake, investigator, approver).

- Administrators can configure approval workflows to match WVBOM's internal policies, ensuring proper segregation of duties.
- Conditional workflows allow staff to escalate applications for further review, request additional documentation, or initiate disciplinary case processes if necessary.

Document and Application Oversight

- Staff can view all uploaded and submitted materials—including applications, renewals, disciplinary documents, and supporting files—directly from the member record.
- The portal provides **side-by-side comparison tools** for reviewing updated documents against originals when members resubmit or revise information.
- Audit logs capture every staff action (view, approve, reject, comment), ensuring a permanent record of the review process.

Transparency and Accountability

- Dashboards allow supervisors and administrators to monitor pending reviews, completed approvals, and processing timelines.
- This ensures accountability, prevents delays, and provides leadership with visibility into workflow bottlenecks.
- Historical decisions remain permanently linked to the member record for compliance and audit purposes.

Summary: The Big Picture v6.14 next portal fully satisfies the requirements of **4.2.2.3.5** by granting WVBOM staff comprehensive administrative oversight of all member applications and documents. Through configurable workflows, audit logging, and role-based access, the system ensures that every approval or denial decision remains secure, traceable, and fully under WVBOM's authority.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.6**

The Big Picture Software platform (v6.14 next) provides WVBOM with a **flexible, configurable application and renewal system** that allows staff to create, modify, and manage application content directly through the administrative interface without requiring custom coding.

Customization and Modification

- WVBOM staff can **customize, edit, or create entirely new application templates** as needed to respond to statutory or policy changes.

- Administrators can configure approval workflows to match WVBOM's internal policies, ensuring proper segregation of duties.
- Conditional workflows allow staff to escalate applications for further review, request additional documentation, or initiate disciplinary case processes if necessary.

Document and Application Oversight

- Staff can view all uploaded and submitted materials—including applications, renewals, disciplinary documents, and supporting files—directly from the member record.
- The portal provides **side-by-side comparison tools** for reviewing updated documents against originals when members resubmit or revise information.
- Audit logs capture every staff action (view, approve, reject, comment), ensuring a permanent record of the review process.

Transparency and Accountability

- Dashboards allow supervisors and administrators to monitor pending reviews, completed approvals, and processing timelines.
- This ensures accountability, prevents delays, and provides leadership with visibility into workflow bottlenecks.
- Historical decisions remain permanently linked to the member record for compliance and audit purposes.

Summary: The Big Picture v6.14 next portal fully satisfies the requirements of **4.2.2.3.5** by granting WVBOM staff comprehensive administrative oversight of all member applications and documents. Through configurable workflows, audit logging, and role-based access, the system ensures that every approval or denial decision remains secure, traceable, and fully under WVBOM's authority.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.6**

The Big Picture Software platform (v6.14 next) provides WVBOM with a **flexible, configurable application and renewal system** that allows staff to create, modify, and manage application content directly through the administrative interface without requiring custom coding.

Customization and Modification

- WVBOM staff can **customize, edit, or create entirely new application templates** as needed to respond to statutory or policy changes.

- Application content can include dynamic form fields, branching logic, conditional requirements, and attachments, all configured through a **drag-and-drop administrative toolset**.
- Common elements such as demographic questions or standard disclosures can be easily applied across multiple application types, reducing duplication and setup time.

Archival and Historical Accuracy

- The system automatically retains **archival copies of all prior iterations** of applications and renewal forms used by members.
- These archival copies are immutable and legally sufficient, ensuring WVBOM maintains a defensible record of exactly what an applicant saw and completed on a given date.
- Staff can retrieve a **true and complete copy of any application**, including its content, questions, and layout as it was presented to the member at the time of submission.

Version Control and Transferability

- Application templates are **version-controlled**, allowing WVBOM staff to track changes over time and roll back if necessary.
- Shared content libraries allow **common fields and sections** (such as contact information, disclosures, or professional history) to be reused across different application types.
- This ensures consistency, reduces redundancy, and improves efficiency when managing multiple credential types.

Compliance and Oversight

- All application modifications, approvals, and archival activities are logged in the **audit trail**, recording the user, date, time, and action taken.
- This provides a defensible compliance record for audits, legal reviews, or policy inquiries.
- By maintaining accurate historical snapshots of application content, WVBOM can demonstrate full transparency and accountability in its licensure processes.

Summary: The Big Picture v6.14 next platform fully satisfies the requirements of **4.2.2.3.6** by empowering WVBOM staff to configure and manage applications without vendor coding, automatically maintaining legally sufficient archival records, and ensuring historical accuracy of all application iterations. The system's versioning and transferability features streamline administration and support regulatory compliance.

***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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.7**

Big Picture Software's upgraded platform (v6.14 next) will provide WVBOM staff with **comprehensive tools to manage member forms, documents, and workflows** within both the back-office environment and the member-facing portal. These tools are designed to increase staff efficiency, maintain compliance with WVBOM's retention policies, and provide flexibility through customizable workspaces.

Document and Form Management

- **Saving and Printing:** Staff can save or print any member forms directly from the system, including applications, communications, reports, supporting documentation, and correspondence.
- **Chronological Sequencing:** The system allows staff to organize documents for any member or group of members in **chronological order**, ensuring clear visibility of the historical record.
- **Retention Policy Compliance:** Built-in retention settings allow documents to be **archived or deleted** in accordance with WVBOM's document retention policy.

Application and Workflow Controls

- **Application Revision:** Staff can revise submitted applications when corrections or clarifications are needed.
- **Hold Functionality:** Applications can be placed on hold, pausing processing until additional documentation or review is completed.
- **Archival:** Completed, denied, or withdrawn applications can be archived, ensuring they remain accessible for historical or compliance purposes.

Customizable Staff Workspace

- The portal provides WVBOM staff with a **configurable dashboard** tailored to their roles and tasks. Examples include:
 - Task lists for pending application reviews.
 - Quick links to compliance cases or member communication.
 - Real-time system alerts for deadlines, renewals, or new submissions.
- Workspaces can be personalized to optimize **daily efficiency and oversight**, while administrators retain the ability to adjust workspace settings across teams.

Key Advantages

- **Unified System:** All document, application, and workflow management occur within one platform, reducing the need for external tools.
- **Auditability:** Every revision, hold, or deletion is logged with a **complete audit trail**, including user ID, timestamp, and action performed.
- **Scalability:** As WVBOM grows, the system can easily adapt to new credential types, workflows, and reporting needs without custom coding.

Summary: Big Picture Software's platform (v6.14 next) equips WVBOM staff with secure, efficient, and customizable tools for managing forms, documents, and workflows. By enabling revisions, holds, archiving, and chronological sequencing of records—all with full audit support—the system ensures compliance and streamlines staff operations.

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 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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.8**

The Big Picture Software platform (v6.14 next) provides WVBOM members with the ability to **save partially completed applications or renewals** and return later to complete them. This ensures members do not lose progress and supports complex application processes that require extended data collection.

Save-and-Resume Functionality

- Applications and renewals can be saved at any stage by the applicant.
- When the member logs back into the portal, the system restores their progress to the exact point where they left off.
- Draft applications remain securely stored in the cloud-based system and are not considered official submissions until finalized by the applicant.
- Staff dashboards clearly distinguish between **draft, submitted, and completed** applications.

FSMB Integration for MD Applications

- The platform supports integration with the **Federation of State Medical Boards (FSMB)** Uniform Application (UA) and the Federation Credentials Verification Service (FCVS).
- Eligible MD applicants can **electronically transfer data** from FSMB into their WVBOM application, eliminating duplicate data entry.
- Integration ensures secure transfer of applicant demographic data, education and training history, exam results, and credential verification packets.
- This accelerates processing, reduces manual input errors, and enhances the applicant experience.

Security and Compliance

- All saved drafts and transferred FSMB data are encrypted and stored under the same strict security standards as finalized applications.
- System audit logs track every save, resume, and data import action, recording the user, date, and time.
- Integration complies with FSMB's interoperability standards and preserves the Board's ownership of all data once received.

Member Experience

- Applicants can pause and resume applications from any device with secure portal access.
- FSMB data import reduces redundancy, especially for MDs applying in multiple states, while still allowing WVBOM-specific requirements to be met.
- This creates a streamlined, user-friendly licensing process while maintaining WVBOM's regulatory control.

Summary: The Big Picture v6.14 next solution fully satisfies the requirements of **4.2.2.3.8** by enabling members to save and resume applications at any time, while also integrating with FSMB's Uniform Application and FCVS services for MD applicants. This ensures both operational efficiency and improved applicant convenience without sacrificing security or compliance.

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:*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9**

The Big Picture Software platform (v6.14 next) ensures that WVBOM maintains a **legally sufficient, accurate, and auditable record** of each member's final application responses. Every submitted application is preserved in its complete form, mirroring exactly what the applicant saw, responded to, and certified at the time of submission.

Complete Final Response Record

- The system captures and stores the **final submitted version** of all applications and renewals, including every response provided by the member.
- Each submission is sealed with a **date and time stamp** and linked to the applicant's user ID, ensuring legal defensibility.
- Records are immutable, meaning they cannot be altered after submission, and any subsequent updates are treated as new iterations while preserving the original.

Historical and Archival Accuracy

- All prior applications and renewals are archived and retrievable for audit, legal, or investigative purposes.
- Archival versions can be accessed and displayed exactly as they appeared to the applicant, ensuring compliance with regulatory and statutory requirements.
- This provides WVBOM with a **defensible chain of custody** for all member application data.

4.2.2.3.9.1 *Mirror all written content and application instructions as viewable by members.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9.1**

The platform preserves a complete record of **all application content and instructions** exactly as they were displayed to the member at the time of submission.

- The system mirrors all written instructions, disclosures, disclaimers, and explanatory notes provided to the applicant during the process.
- This guarantees that, if needed, WVBOM can produce a **true and accurate representation** of what the applicant read and acknowledged when completing their application.

- Both the content and formatting are preserved, ensuring that staff, legal reviewers, or auditors can validate the accuracy of the application environment at the time of submission.

Summary: The Big Picture v6.14 next solution fully meets the requirements of **4.2.2.3.9** and **4.2.2.3.9.1** by maintaining immutable, legally sufficient final records of member responses and preserving all application content and instructions as originally presented. This ensures defensibility, transparency, and compliance with recordkeeping obligations.

4.2.2.3.9.2 Accurately reflect the information entered and saved by members in response to each question.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9.2**

The Big Picture Software platform (v6.14 next) is designed to ensure that all member responses are **captured exactly as entered and saved** during the application and renewal process.

Accurate Data Capture

- Each field completed by a member is stored in the database exactly as submitted, including text entries, checkbox selections, dropdown choices, and uploaded files.
- The system enforces **real-time validation** (e.g., required fields, correct formats for dates or numbers) to ensure that saved responses are both accurate and complete before submission.

Immutable Final Record

- Once a member finalizes and submits their application, the system creates an **immutable snapshot** of the data as entered.
- This snapshot is preserved alongside the official application record, ensuring that WVBOM has a legally sufficient record of every response.
- Any post-submission changes by the member (such as resubmissions or updates) are logged as **new iterations**, while the original responses remain unaltered and accessible.

Historical Accuracy and Retrieval

- Staff can retrieve **exactly what the member entered** for each question at the time of submission, including date and time stamps.
- The system maintains a **historical record of all responses across application cycles**, allowing WVBOM to view an applicant's progression over time.
- This supports audits, investigations, and compliance reviews by ensuring that the record is both complete and trustworthy.

Summary: The Big Picture v6.14 next solution fully satisfies the requirements of **4.2.2.3.9.2** by guaranteeing that every member response is captured accurately, stored immutably, and retrievable in its original form. This ensures transparency, compliance, and defensibility of all applications and renewals.

4.2.2.3.9.3 *Be automatically saved in .PDF format within each member's database record resources.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9.3**

The Big Picture Software platform (v6.14 next) ensures that every finalized application and renewal is **automatically converted into a PDF** and stored within the member's permanent database record. This process guarantees legal sufficiency, immutability, and long-term accessibility of application materials.

Automated PDF Generation

- Upon submission, the system automatically generates a **PDF copy of the complete application**, including all responses, instructions, and disclaimers as seen by the applicant.
- This PDF mirrors the application exactly, ensuring it serves as a **true and accurate legal record**.
- The process is entirely automated and does not require staff intervention.

Secure Storage in Member Record

- The generated PDF is stored directly in the member's secure **database record resources**.
- PDFs are tagged with metadata such as submission date, application type, and version number, making them easy to retrieve in audits or reviews.
- Each PDF is retained indefinitely or in accordance with WVBOM's **document retention policies**.

Accessibility and Compliance

- Authorized staff can view, print, or export the PDF directly from the member's record as needed.
- The system ensures compliance with recordkeeping and legal requirements by preserving applications in a **widely accepted archival format (PDF/A)** that is suitable for long-term storage.
- Any resubmitted or updated applications generate a **new PDF snapshot**, while previous versions remain archived for historical accuracy

Summary: The Big Picture v6.14 next solution fulfills **4.2.2.3.9.3** by automatically saving each finalized application and renewal as a legally sufficient PDF within the member's record. This guarantees accurate, immutable, and easily retrievable records, supporting both compliance and operational efficiency.

4.2.2.3.9.4 *Contain Member identity and page number information on each page of the PDF.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9.4**

Automated PDF Generation

The Big Picture Software (v6.14.next) platform automatically generates all completed application and renewal documents as legally sufficient, read-only PDF records. Each PDF is generated directly from the system database at the time of submission, ensuring that the content and metadata reflect the member's final responses and submission timestamp.

Member Identity and Page Numbering

- Every PDF generated by the system includes Member identity information—such as full name, license number, and credential type—displayed in the header or footer of each page.
- Each page of the PDF is automatically numbered (e.g., *Page 1 of 5*, *Page 2 of 5*), maintaining document integrity and ensuring that no pages can be altered, inserted, or removed post-generation.
- Identity and pagination elements are system-controlled and cannot be edited by the user, ensuring consistency and compliance with legal recordkeeping standards.

Integration and Security

- The generated PDF is automatically stored in the member's digital record within the secure cloud-based documentation system.
- The document remains linked to the member's profile and is retrievable at any time by authorized WVBOM staff or the member through the self-service portal.
- PDFs are encrypted in storage and protected by role-based access controls, ensuring only authorized access.

Exceeding Requirements

- The system's PDF generation engine also embeds metadata including the submission date/time, application ID, and WVBOM branding, enhancing traceability and professional presentation.
- The PDF output is formatted for legibility using a minimum of 11-point Times New Roman or equivalent font, ensuring accessibility and compliance with WCAG 2.1 AA readability standards.

Summary:

Big Picture Software's **automated PDF generation** process ensures every record includes **member identity** and page numbering on each page, fully meeting WVBOM's documentation and compliance requirements. This functionality exceeds expectations by embedding metadata, securing files within the cloud-based system, and guaranteeing **document integrity** and **accessibility**.

4.2.2.3.9.5 Include the date of electronic submission by member.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9.5**

The Big Picture Software platform (v6.14 next) automatically captures and records the **exact date and time of electronic submission** for every application and renewal. This ensures that WVBOM maintains a legally sufficient record of when a member formally submitted their information.

Automatic Timestamping

- Upon submission, the system generates an **electronic timestamp** that includes the full date and time (to the second) of submission.
- This timestamp is linked to the member's unique ID, providing a verifiable and immutable record of the event.
- The timestamp is preserved both in the **database record** and in the automatically generated **PDF archival copy** of the application.

Legal and Compliance Considerations

- Capturing the submission date supports statutory, regulatory, and procedural requirements for licensing timelines, renewal deadlines, and disciplinary proceedings.
- The timestamp is part of the official audit trail, ensuring accountability and defensibility in cases where deadlines or submission timing are critical.

Staff and Member Access

- Staff can view submission dates directly in the member's dashboard, application record, or through **custom reporting tools**.
- Members also see their submission date on confirmation pages and in correspondence generated by the system, ensuring transparency.

Summary: The Big Picture v6.14 next solution fulfills **4.2.2.3.9.5** by automatically recording and preserving the date and time of every electronic submission, embedding this information into both database records and archival PDFs to ensure compliance, accuracy, and defensibility.

4.2.2.3.9.6 Utilize readable font no smaller than visual size of 11-point Times New Roman font.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.3.9.6**

The Big Picture Software platform (v6.14 next) ensures that all application records, archival PDFs, and member-facing documents comply with **readability and formatting requirements** specified by WVBOM.

Readable Font Standards

- All automatically generated records, including PDFs, application confirmations, and correspondence, are rendered in a **readable font no smaller than 11-point Times New Roman (or equivalent)**.
- The system uses industry-standard formatting to ensure accessibility, legal sufficiency, and professional presentation.

Consistency Across Records

- Application records mirrored in the archival system are formatted to maintain uniform readability.
- This applies to all member submissions, instructions, responses, and official correspondence generated by the portal.

Summary: The Big Picture v6.14 next solution fully meets the requirements of **4.2.2.3.9.7** by ensuring members can securely access their complete application and renewal records through their portal, including PDF archives and submission confirmations. This promotes transparency, accountability, and efficiency while protecting data security.

4.2.2.4 Data and Compliance

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.4**

The Big Picture Software platform (v6.14 next) provides WVBOM with a modernized, secure, and fully compliant data management framework that ensures the integrity, confidentiality, and accessibility of all Board records. The system is designed to meet both **operational needs** and **regulatory obligations**, while supporting scalability for future growth.

Data Security and Privacy

- All data is encrypted both **in transit (TLS 1.2/1.3)** and **at rest (AES-256)**, ensuring that sensitive information cannot be intercepted or accessed by unauthorized parties.
- Role-based access controls (RBAC) enforce the **principle of least privilege**, limiting access to data based on staff responsibilities.
- The system integrates with modern **multi-factor authentication (MFA)** options to enhance account security for both staff and members.

Compliance with Legal and Regulatory Standards

- The solution aligns with applicable **state and federal data protection laws** (e.g., HIPAA for protected health information where applicable, NIST standards, and state cybersecurity statutes).
- Compliance measures are built into workflows, ensuring that all records are managed in accordance with **WVBOM's document retention and destruction policies**.
- System audit trails track every user action, providing a transparent and legally defensible record of all data interactions.

Data Migration and Integrity

- All historical data from WVBOM's legacy systems will be **migrated and validated** into the new solution.
- The migration process includes reconciliation steps, integrity checks, and cross-verification to ensure that no records are lost or corrupted.
- Historical data will remain fully searchable and reportable, providing staff with seamless continuity and improved access compared to current limitations.

Reporting and Monitoring

- Built-in monitoring tools flag irregular data access, failed login attempts, or unauthorized activity.

- Regular reporting on access logs, retention compliance, and data storage health ensures proactive oversight.
- Staff dashboards highlight pending compliance tasks, such as document retention deadlines, ensuring consistent adherence to policy.

Scalability and Future-Proofing

- The platform is built on a **cloud-first, modular architecture** that supports growth in data volume, user base, and new credential types without requiring major redevelopment.
- APIs enable integration with trusted third-party systems (FSMB, VeriDoc, IMLC), ensuring compliance with national standards while maintaining local control.

Summary: The Big Picture v6.14 next solution fulfills the requirements of **4.2.2.4 Data and Compliance** by delivering a secure, compliant, and scalable environment. It provides encrypted data storage, audit trails, legally sufficient recordkeeping, and robust reporting, ensuring WVBOM remains compliant with legal obligations while improving operational efficiency.

***4.2.2.4.1** 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.*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.4.1**

The Big Picture Software platform (v6.14 next) is designed to safeguard **Protected Health Information (PHI)** under the **Health Insurance Portability and Accountability Act (HIPAA)** and **Personally Identifiable Information (PII)**, ensuring that WVBOM data and communications remain confidential, secure, and compliant with state and federal regulations.

HIPAA and PII Protections

- All data is encrypted **in transit (TLS 1.2/1.3)** and **at rest (AES-256)** to protect PHI and PII against interception or unauthorized access.
- The system enforces **role-based access controls (RBAC)** so that only authorized WVBOM staff may view or manage PHI and PII, strictly on a need-to-know basis.
- Advanced authentication, including support for **multi-factor authentication (MFA)**, ensures secure access by both staff and members.

Compliance Verification

- The platform is developed and hosted in environments that adhere to **HIPAA Security Rule, Privacy Rule, and Breach Notification Rule standards**.
- Independent **third-party security audits and compliance attestations** are performed regularly. Upon request, Big Picture Software will provide WVBOM with documentation verifying HIPAA and PII compliance.
- System architecture aligns with **NIST 800-53 and NIST Cybersecurity Framework guidelines**, further strengthening protections for sensitive data.

Ongoing Monitoring and Safeguards

- Continuous monitoring, logging, and alerting tools detect and respond to suspicious access attempts or anomalous activity.
- Staff activity within the system is captured in detailed **audit logs**, which record the user, action taken, and date/time of each event involving PHI or PII.
- Security patches and updates are applied proactively, with all critical vulnerabilities addressed according to industry best practices.

Summary: The Big Picture v6.14 next solution meets the requirements of **4.2.2.4.1** by delivering a secure, HIPAA-compliant environment for handling PHI and PII, with full encryption, access controls, and audit logging. Independent third-party compliance documentation will be provided upon WVBOM's request, ensuring confidence in the platform's ability to manage confidential information and communications.

***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 disabilities. Vendor must provide third-party documentation verifying compliance upon request.*

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.2.2.4.2.

The Big Picture Software (v6.14.next) platform is developed, tested, and maintained to ensure complete accessibility and usability for all users — including **individuals with disabilities** — in compliance with the Web Content Accessibility Guidelines (WCAG) 2.1, Level AA, as well as other relevant accessibility standards.

WCAG 2.1 Level AA Compliance

The system meets or exceeds WCAG 2.1, Level AA requirements through:

- **Screen Reader Compatibility:** All navigational, content, and form elements are compatible with industry-standard screen readers (JAWS, NVDA, VoiceOver).
- **High-Contrast and Scalable Text:** Visual options and responsive text scaling support users with vision impairments.
- **Keyboard-Only Navigation:** Every function of the system is accessible without a mouse, ensuring full usability for users with mobility limitations.
- **Consistent Structure:** Uniform use of headings, landmarks, and labels to improve navigation and comprehension for assistive technologies.
- **Accessible Forms and Inputs:** Form fields include proper labeling, error identification, and validation cues.

Accessibility is built into every stage of development—from interface design through quality assurance—ensuring compliance is proactive, not reactive.

Broader Accessibility Standards

- The platform also aligns with Section 508 of the Rehabilitation Act and ADA Title II digital accessibility requirements.

- All modules, including reporting and administrative tools, are tested against multiple assistive technologies to ensure compatibility and consistent user experience.

Verification and Documentation

- Big Picture Software conducts third-party accessibility audits to verify compliance and identify areas for continuous improvement.
- Upon request, WVBOM will be provided with formal third-party documentation confirming WCAG 2.1, Level AA compliance across all modules and deliverables.

Continuous Accessibility Commitment

- Accessibility regression testing is included in every major release cycle to ensure that upgrades never compromise compliance.
- Built-in feedback and issue reporting tools allow users or staff to flag accessibility concerns directly, which are prioritized in maintenance and patch updates.

Summary:

Big Picture Software's platform not only complies with WCAG 2.1 Level AA but goes beyond by incorporating ADA and Section 508 requirements, ongoing third-party audits, and accessibility-by-design development. This ensures that all users — including individuals with disabilities — can fully interact with WVBOM's website, database, and documentation system.

4.2.2.4.3 *"The vendor must meet all currently applicable Payment Card Industry Data Security Standards (PCIDSS) security requirements and any updates thereto, all as reflected at www.pcisecuritystandards.org."*

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.4.3**

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.*

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.

During the life of the contract, Vendor should make available to the WVBOM all new software versions and patches of defects.

Vendor should provide support to the WVBOM in making necessary modifications, additions, change orders, customizations, and/or corrections to defects in the systems.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.2.2.5**

Big Picture Software is committed to providing **long-term, high-quality maintenance and support services** to the WVBOM following system implementation. Our support model ensures that the Board and its members have continuous access to responsive assistance, system enhancements, and software improvements throughout the life of the contract as we have for the last decade.

Help Desk and Immediate Support

- A **dedicated help desk service** is available via telephone, email, and secure remote desktop support.

- Support is provided to both **WVBOM staff** (administrators, licensing staff, IT) and **end-user members** (licensees, applicants).
- Urgent issues are prioritized for **immediate escalation**, with sufficient staffing to ensure coverage and rapid resolution.

Ongoing Maintenance and Software Updates

- Big Picture Software provides all **new releases, patches, and updates** to ensure WVBOM always benefits from the most secure, stable, and feature-rich version of the platform.
- Maintenance includes **defect remediation**, performance improvements, and deployment of enhancements at no additional cost under standard support.
- The upgrade path is seamless, leveraging the WVBOM's existing environment (currently on version 6.10) to move to (**v6.14 next**) with minimal disruption.

Modifications, Customizations, and Change Orders

- Support includes assisting WVBOM in making **necessary modifications, additions, and customizations** to meet evolving statutory, regulatory, or operational requirements.
- Any identified defects are addressed as part of ongoing maintenance, with patches deployed promptly.
- Change management processes ensure modifications are tested, validated, and implemented with minimal risk to production operations.

Staffing and Expertise

- Our support team consists of experienced developers, system administrators, and licensing domain specialists who have successfully supported boards and commissions for over 20 years.
- Staff continuity and deep product knowledge ensure that WVBOM always has access to personnel who understand both the **technical system** and the **regulatory mission** of the Board.

Commitment to Partnership

- Big Picture Software views maintenance and support as a **partnership** with WVBOM, ensuring that staff, applicants, and licensees can rely on a stable, secure, and continuously improving platform.
- Regular communication, release notes, and feedback sessions ensure that the system continues to meet WVBOM's operational needs and evolving requirements.

Summary: The Big Picture v6.14 next solution meets the requirements of **4.2.2.5 Ongoing Maintenance and Support** by providing WVBOM with comprehensive help desk services, continuous software updates, immediate support staffing, and the ability to handle modifications, customizations, and defect corrections throughout the life of the contract.

4.3 Qualifications and Experience:

Big Picture™ Software

Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems similar to those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives were and how they were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.3.

Proven Experience and Partnership

Big Picture Software, a division of Albertson Consulting, has provided **continuous technology solutions, hosting, and support to the West Virginia Board of Medicine (WVBOM)** for more than a decade. The same core team that designed, deployed, and maintained WVBOM's existing licensing and regulatory management system will continue supporting this project—ensuring **unmatched continuity, institutional knowledge, and trust**.

Our deep familiarity with WVBOM's workflows, regulatory processes, and operational needs positions us uniquely to deliver a smooth and risk-free modernization. With the planned upgrade from **Big Picture v6.10 to (v6.14.next)**, the Board will gain enhanced system performance, security, and new features—without disruption to users or public services.

Staffing and Expertise

Project Leadership

- Managed by a **Senior Project Manager** with over 20 years of experience in state regulatory technology, licensing systems, and database-driven modernization initiatives.
- The project lead has overseen multiple successful state board implementations, including West Virginia, South Dakota, and North Dakota.

Technical Team

- Certified **Microsoft SQL Server** professionals and software engineers experienced in web-based licensing systems, integrations, and data migration.
- Developers hold degrees in **Computer Science, Information Systems, and Software Engineering**, with specialized credentials in cybersecurity and cloud infrastructure.

Support and Help Desk

- The same support personnel who have served WVBOM users for over ten years will remain assigned to this contract, ensuring rapid response and familiarity with the Board's procedures.
- Our Tier 1–3 support tiers provide **24/7 monitoring, remote assistance, and escalation handling** for both staff and licensee inquiries.

Vendor should provide information and documentation regarding its qualifications and experience in providing services or solving problems similar to those requested in this RFP. Information and documentation should include, but is not limited to, copies of any staff certifications or degrees applicable to this project, proposed staffing plans, descriptions of past projects completed (descriptions should include the location of the project, project manager name and contact information, type of project, and what the project goals and objectives where and how they were met.), references for prior projects, and any other information that vendor deems relevant to the items identified as desirable or mandatory below.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.3.

Proven Experience and Partnership

Big Picture Software, a division of Albertson Consulting, has provided **continuous technology solutions, hosting, and support to the West Virginia Board of Medicine (WVBOM)** for more than a decade. The same core team that designed, deployed, and maintained WVBOM's existing licensing and regulatory management system will continue supporting this project—ensuring **unmatched continuity, institutional knowledge, and trust.**

Our deep familiarity with WVBOM's workflows, regulatory processes, and operational needs positions us uniquely to deliver a smooth and risk-free modernization. With the planned upgrade from **Big Picture v6.10 to (v6.14.next)**, the Board will gain enhanced system performance, security, and new features—without disruption to users or public services.

Staffing and Expertise

Project Leadership

- Managed by a **Senior Project Manager** with over 20 years of experience in state regulatory technology, licensing systems, and database-driven modernization initiatives.
- The project lead has overseen multiple successful state board implementations, including West Virginia, South Dakota, and North Dakota.

Technical Team

- Certified **Microsoft SQL Server** professionals and software engineers experienced in web-based licensing systems, integrations, and data migration.
- Developers hold degrees in **Computer Science, Information Systems, and Software Engineering**, with specialized credentials in cybersecurity and cloud infrastructure.

Support and Help Desk

- The same support personnel who have served WVBOM users for over ten years will remain assigned to this contract, ensuring rapid response and familiarity with the Board's procedures.
- Our Tier 1–3 support tiers provide **24/7 monitoring, remote assistance, and escalation handling** for both staff and licensee inquiries.

A detailed staffing matrix outlining roles—including Project Manager, Solution Architect, Lead Developer, Database Administrator, and Support Technician—can be provided upon request.

Relevant Past Projects

1. West Virginia Board of Pharmacy (WVBOP)

- **Type:** Full modernization and migration of licensing and regulatory systems.
- **Objectives:** Replace legacy infrastructure, enhance online applications and renewals, and streamline case management.
- **Outcome:** Successfully implemented Big Picture Software v6.14, enabling real-time online services, integrated reporting, and improved performance.
- **Reference:** [Contact details to be provided upon request]

2. West Virginia Board of Medicine (WVBOM)

- **Type:** Ongoing licensing and regulatory system support and hosting.
- **Objectives:** Maintain and optimize licensing workflows, renewals, and complaint case management.
- **Outcome:** Over a decade of reliable, uninterrupted service and collaboration, demonstrating consistent performance and alignment with Board objectives.

Additional client references and project manager contact information can be provided upon WVBOM's request.

Industry Knowledge and Problem-Solving

Big Picture Software specializes in **licensing, regulation, and case management systems** for state boards and commissions. Our solutions have consistently delivered:

- **Digital transformation** of paper-based processes.
- **Data migration** from legacy systems to modern, compliant databases.
- **Cloud-hosted licensing portals** for staff and licensees.
- **Integrated reporting and analytics** for improved decision-making.
- **Secure infrastructure with full disaster recovery** and uptime monitoring.

This specialization ensures WVBOM benefits from best practices refined through similar engagements across multiple states.

Summary

Big Picture Software offers **unmatched qualifications**, a proven record of success, and over ten years of direct partnership with WVBOM. Our experienced and certified staff, successful project history with similar boards, and deep understanding of licensing system modernization make us the most qualified vendor to continue supporting and advancing WVBOM's mission. Our commitment is simple: **modernize without disruption, enhance without risk, and continue the trusted relationship that has already delivered a decade of reliable service.**

4.3.1. Qualification and Experience Information:

Vendor should describe in its proposal how it meets the desirable qualification and experience requirements listed below.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.3.1

Demonstrated Experience in Regulatory and Licensing Systems

Big Picture Software has over **20 years of experience** delivering licensing, regulatory, and case management solutions for professional licensing boards and state agencies. For more than **10 years, we have supported the West Virginia Board of Medicine** with its licensing platform, providing stable operations, responsive support, and ongoing improvements. This direct experience ensures our team already understands WVBOM's workflows, stakeholders, and mission.

Staff Expertise and Certifications

Our team consists of:

- **Certified database administrators** and developers with expertise in Microsoft SQL Server, Oracle and enterprise cloud infrastructure.
- **Project managers with PMP certifications** and deep experience leading multi-agency technology deployments.
- **Support specialists** with over a decade of direct engagement with WVBOM, ensuring continuity of service.
- **Information security professionals** trained in HIPAA, NIST, and state cybersecurity standards.

Resumes and documentation of staff certifications and degrees are available upon request.

Proven Track Record with Similar Projects

We have successfully delivered projects of similar size and scope, including:

- **West Virginia Board of Pharmacy** – Full platform upgrade and migration to Big Picture, improving application processing, reporting, and compliance functions.
- **West Virginia Board of Medicine (current)** – Long-term hosting, support, and licensing system management, now preparing for upgrade to (v6.14 next).
- **Other regulatory boards** – Multiple engagements with state agencies to modernize licensing workflows, migrate legacy data, and deploy secure portals for staff and licensees.

Each of these projects involved:

- Data migration from legacy platforms.
- Deployment of configurable online application and renewal workflows.
- Enhanced reporting, compliance, and auditing capabilities.
- Ongoing support and maintenance under long-term contracts.

References and project contact information will be provided upon request.

Staffing Plan and Capacity

We maintain a **dedicated support and development team** for licensing clients. For WVBOM, this means:

- The **same staff who have supported the Board for 10+ years** will continue to serve, supplemented with additional specialists as needed for the upgrade.
- Adequate staffing to provide **help desk, remote support, and immediate escalation** when critical issues arise.
- A project manager assigned as the single point of contact, ensuring accountability and responsiveness throughout implementation and support.

Commitment to Continuous Improvement

Because WVBOM has been operating on our platform for more than a decade, upgrading to version (6.14 next) does not require rebuilding or redeployment. Instead, the upgrade provides **enhanced features, improved performance, and expanded compliance tools**, while leveraging the **same trusted staff** and proven support processes.

Summary: Big Picture Software fully satisfies the requirements of **4.3.1** by demonstrating long-standing direct experience with WVBOM, a highly qualified and certified staff, a history of successful projects for state licensing boards, and a proven capacity to continue supporting and enhancing the Board's technology environment.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.3.1.1**.

Economical and Experienced Staffing Approach

Big Picture Software proposes a staffing plan that leverages the **same core team of professionals who have successfully supported WVBOM for over 10 years**, ensuring continuity, institutional knowledge, and efficiency. Because our team already understands WVBOM's environment and processes, we avoid costly learning curves or onboarding delays. This approach provides the **most economical solution** while still ensuring high-quality service delivery.

Creation and Implementation Phase (Upgrade to v6.14 next)

During the **8–12-month upgrade period**, we will assign a dedicated implementation team with the following roles:

- **Project Manager (1 FTE):** Oversees the project timeline, deliverables, and communication with WVBOM leadership.
- **Solution Architect (1 FTE):** Designs system configurations, integrations, and oversees technical implementation.
- **Developers/Database Engineers (2–3 FTEs):** Handle data migration, system configuration, and customization of workflows.

- **Quality Assurance/Test Specialist (1 FTE):** Ensures that all features, data, and integrations are tested before production.
- **Training and Change Management Lead (1 FTE):** Provides training materials and sessions for WVBOM staff.

This team will work collaboratively with WVBOM stakeholders and current IT staff to ensure a smooth transition from (v6.10 to v6.14 next).

Ongoing Support and Maintenance Phase

Following go-live, support will transition to our **established Help Desk and Maintenance team**, which includes:

- **Help Desk Technicians (2–3 staff available):** First-line support for WVBOM staff and end-user members via phone, email, and remote desktop.
- **Support Engineers (1–2 staff available):** Handle escalated issues, configuration changes, and technical troubleshooting.
- **Project Manager / Account Manager (part-time oversight):** Serves as the escalation point and ensures continuity of communication with WVBOM leadership.

This staffing ensures **immediate support coverage** while leveraging the same individuals who already know WVBOM's systems, ensuring that issues are resolved quickly and efficiently.

Skills Coverage Throughout the Contract

Our staffing plan provides the full range of skills necessary to support the project lifecycle:

- **Strategic Oversight:** Project management and regulatory expertise.
- **Technical Expertise:** Database administration, software development, cloud hosting, and security compliance.
- **Operational Support:** Help desk services, training, and ongoing maintenance.
- **Customization & Enhancements:** Developers available to configure workflows, reporting, and future features as WVBOM's needs evolve.

Summary: Big Picture Software's staffing plan ensures that WVBOM receives **continuity of service from the same trusted team** that has provided reliable support for the past decade. By combining dedicated staff for the implementation phase with an established, responsive support team for ongoing operations, our plan ensures WVBOM has the skills and resources needed to meet every requirement of this RFP in the most economical manner.

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.

Response:

Big Picture Software has a proven history of delivering **professional licensing and regulatory management solutions** for state boards and commissions. Our track record demonstrates

successful completion of projects of **similar scope and size** to the WVBOM engagement, including long-term system support, upgrades, and modernization efforts.

Example Projects

1. West Virginia Board of Pharmacy (WVBOP)

- **Project Type:** Comprehensive licensing system modernization and upgrade to Big Picture Software.
- **Scope:** Migration of all legacy licensing data, deployment of secure member and staff portals, enhancement of reporting features, and full compliance with HIPAA and PII requirements.
- **Outcome:** Delivered a fully integrated licensing and regulatory management system, improving efficiency, transparency, and compliance.
- **Reference Contact:** [Project Manager details as provided in final submission].

2. West Virginia Board of Medicine (WVBOM) – Current and Ongoing Partnership

- **Project Type:** Licensing system hosting, support, and enhancement.
- **Scope:** Over 10 years of continuous support, including data management, workflow automation, and system upgrades. Currently preparing to upgrade from v6.10 to v6.14 next.
- **Outcome:** Reliable operations for more than a decade, trusted support relationships, and smooth adaptation of licensing processes over time.

3. Other State Licensing and Regulatory Agencies

- Big Picture Software has worked with over 50 boards and commissions to replace outdated systems with modernized licensing platforms. These projects included:
 - Full data migrations from legacy systems.
 - Development of customizable applications and renewals.
 - Deployment of disciplinary case management modules.
 - Implementation of secure reporting and compliance tools.

Documentation and References

- We can provide **detailed reference contact information**, including project managers and board administrators, upon request.
- References can verify our ability to deliver on-time, on-budget, and to the satisfaction of regulatory boards with missions comparable to WVBOM.

Summary: Big Picture Software meets the requirements of **4.3.1.2** by demonstrating a successful track record with licensing boards, including more than 10 years of direct partnership with WVBOM itself and a fully documented, successful modernization for the West Virginia Board of Pharmacy. These examples confirm our ability to handle projects of similar scope, size, and complexity with excellent results.

4.3.1.3. Vendor should propose a strategy to migrate data between the Board's legacy database and the

proposed solution.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.3.1.3**.

Big Picture Software has extensive experience migrating legacy licensing data into modern platforms for professional boards. Because WVBOM already operates on our platform (v6.10), the migration to **(v6.14 next)** is streamlined and carries significantly less risk than a typical migration from an unfamiliar vendor's system.

1. Migration Objectives

- **Preserve Data Integrity:** Ensure that all existing member records, historical data, disciplinary actions, applications, and renewal records are migrated with complete fidelity.
- **Minimize Downtime:** Schedule migrations and cutovers during low-use periods to avoid disruption of Board operations.
- **Enhance Accessibility:** Ensure migrated data leverages the new system's improved search, reporting, and compliance capabilities.

2. Migration Methodology

Our migration process is built on a **phased and validated approach**:

1. **Transformation & Loading**
 - Transform data to align with new system structures and validation rules.
 - Load data into a secure staging environment in (v6.14.next) for verification.
2. **Validation & Testing**
 - Conduct side-by-side testing to confirm accuracy of migrated data.
 - Engage WVBOM staff in **User Acceptance Testing (UAT)** to validate completeness and usability.
 - Run audit reports to verify financial, licensing, and disciplinary histories match across systems.
3. **Cutover & Go-Live**
 - Perform a final migration, typically over a weekend or low-activity period.
 - Switch WVBOM to the upgraded system with **minimal downtime**.
4. **Post-Migration Support**
 - Provide immediate help desk and technical support following go live.
 - Monitor system performance and validate workflows during the first 30–60 days of live operation.
5. **Data Governance and Security**
 - All migrations are conducted using **secure encrypted transfer protocols**.
 - Data handling complies with **HIPAA and PII safeguards**.
 - Audit logs are maintained for all migration activities to ensure traceability.
 -

Our data migration strategy has been successfully applied in multiple state licensing board projects, including WVBOP and WVBOM itself. This proven methodology ensures that

historical records remain intact, legally sufficient, and accessible while positioning the Board to benefit from the enhanced features of (v6.14 next).

Summary: Big Picture Software meets the requirements of **4.3.1.3** by offering a secure, structured, and proven data migration strategy. Because WVBOM is already on our platform, the transition to (v6.14 next) will be lower risk, more efficient, and will deliver full continuity of operations with enhanced capabilities.

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.

Response: Response: Big Picture Software fully satisfies and exceeds the requirements of **4.3.1.4**.

In addition to providing licensing, regulatory, and case management solutions, Big Picture Software offers a **full suite of complementary services** that directly support the WVBOM's mission and ensure smooth technological operations.

Website Creation and Hosting

- Big Picture Software provides **secure, scalable website hosting** using industry-standard cloud infrastructure.
- We have the ability to design, build, and maintain **public-facing websites** that integrate seamlessly with licensing and regulatory systems.
- Our web solutions adhere to **WCAG 2.1 Level AA accessibility standards**, ensuring compliance and usability for all stakeholders.

Domain Management and Forwarding

- We manage **domain registration, forwarding, SSL certificates, and DNS configuration**, ensuring continuous website availability and security.
- Forwarding services can be configured to direct legacy URLs or alternate domains to the primary WVBOM site without disruption.

Integrated Portal Services

- Beyond the main WVBOM website, we provide **secure member and staff portals** with role-based access controls, dashboards, and reporting.
- Portals are integrated into the main website with **consistent branding** to create a seamless user experience.

Cloud Hosting and Disaster Recovery

- Our hosting services include **data redundancy, backup, and disaster recovery**, ensuring continuity of operations in the event of system disruption.
- We provide **Service Level Agreements (SLAs)** that guarantee uptime and response times.

Additional Support Services

- **Custom Development:** Configuration of new workflows, credential types, or reporting modules as needed.
- **Training & Documentation:** Comprehensive training for staff and end users, along with detailed reference documentation.
- **Security Services:** Ongoing monitoring, patching, and compliance updates to ensure HIPAA, PII, and state cybersecurity compliance.

Summary: Big Picture Software meets the requirements of **4.3.1.4** by offering more than just licensing solutions. Our capabilities extend to **website creation, hosting, domain forwarding, and integrated portal services**, all delivered with the same level of quality and reliability that WVBOM has relied upon for the last decade.

4.3.2. **Mandatory Qualification/Experience Requirements:**

The following mandatory qualification/experience requirements must be met by the Vendor as a part of its submitted proposal. Vendor should describe how it meets the mandatory requirements and include any areas where it exceeds the mandatory requirements. Failure to comply with mandatory requirements will lead to disqualification, but areas where the mandatory requirements are exceeded will be included in technical scores where appropriate. The mandatory qualifications/experience requirements are listed below.

Response:4.3.2 Mandatory Qualification/Experience Requirements

Big Picture Software meets **all mandatory qualifications and experience requirements** outlined in the RFP. In fact, our long-standing relationship with the West Virginia Board of Medicine (WVBOM), coupled with successful projects for other professional licensing boards, demonstrates that we not only satisfy the baseline requirements but also bring **proven enhancements and value-added capabilities** that exceed expectations.

1. Direct Experience with WVBOM

- **Requirement Met:** Big Picture Software has supported WVBOM for over **10 years** with hosting, support, and licensing system operations.
- **Exceeds Requirement:** Because we are the incumbent vendor, we already understand WVBOM's workflows, data structures, and staff needs. This continuity reduces transition risk and accelerates the upgrade timeline.

2. Experience with Similar Professional Licensing Boards

- **Requirement Met:** We have delivered modern licensing platforms to **multiple state agencies**, including the **WV Board of Pharmacy (WVBOP) and more than 50 others**.
- **Exceeds Requirement:** Our systems have been proven across multiple domains (medicine, pharmacy, nursing, and other professional licensure boards), demonstrating adaptability to varied credentialing environments.

3. Qualified Staff and Certifications

- **Requirement Met:** Our staff includes **certified database administrators, project managers (PMP-certified), and developers with degrees in Computer Science/Information Systems**.

- **Exceeds Requirement:** The same staff who have supported WVBOM for the past decade remain assigned, supplemented by additional specialists in security, cloud infrastructure, and compliance. This ensures both **continuity and expanded expertise**.

4. Compliance with Security and Accessibility Standards

- **Requirement Met:** The platform complies with **HIPAA, PII, NIST, and WCAG 2.1 Level AA standards**.
- **Exceeds Requirement:** Big Picture provides **audit documentation** verifying compliance, proactive vulnerability scanning, and continuous monitoring, exceeding minimum compliance expectations.

5. Data Migration and Legacy Support

- **Requirement Met:** We have a proven data migration methodology that ensures complete, accurate migration of all historical records.
- **Exceeds Requirement:** Because WVBOM is already on our platform (v6.10), the migration to (v6.14 next) is **lower risk, faster, and more economical** than a new deployment.

6. Ongoing Maintenance and Support

- **Requirement Met:** We provide full **help desk, remote support, software patches, and ongoing updates**.
- **Exceeds Requirement:** Our 24/7 support coverage and **direct access to experienced staff who already know WVBOM** goes beyond typical vendor offerings, ensuring fast, informed issue resolution.

Summary: Big Picture Software not only meets but exceeds the mandatory qualifications and experience requirements. Our decade-long support of WVBOM, combined with successful delivery of comparable projects like WVBOP, a highly qualified and certified team, and enhanced compliance/security features, positions us as the vendor best suited to deliver a successful and low-risk solution for the Board.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.3.2.1.

Within the past three (3) years, Big Picture Software has successfully completed multiple licensing system migrations and implementations for professional licensing boards across the United States. These projects involved migrating legacy databases, deploying secure web-based licensing and case management systems, and providing ongoing hosting and support—substantially similar to the specifications outlined in this RFP.

Recent Comparable Engagements

1. West Virginia Board of Pharmacy (WVBOP)

- Year Completed: 2023
- Scope: Full modernization of the Board's legacy licensing database to the Big Picture Software v6.14 platform.
- Activities:
 - Migrated all historical data from the legacy Oracle and Access databases into a modern SQL-based environment.
 - Implemented full online application and renewal functionality.
 - Integrated disciplinary case management and cloud-based documentation features.
- Outcome: The project was delivered on schedule and within budget, resulting in a seamless transition with zero data loss and improved operational efficiency.
- Current Status: Ongoing hosting and support under annual maintenance contract.

2. West Virginia Board of Osteopathic Medicine (WVBOST)

- Year Completed: Ongoing
- Scope: Long-term hosting and modernization support of the WVBOST's licensing and regulatory systems.
- Activities:
 - System maintenance, version updates, and enhancement of digital workflows.
 - Preparing for the upgrade to Big Picture v6.14.next as part of this RFP.
 - Continued improvement of data accessibility, reporting, and self-service features.
- Outcome: Over 10 years of reliable operation and support with consistent data integrity and uptime exceeding 99.9%.

Experience and Capability

Big Picture Software has **extensive experience** performing data migrations, system modernizations, and ongoing support for professional licensing boards. Our structured, low-risk migration methodology ensures:

- Comprehensive data mapping, cleansing, and validation.
- Preservation of historical integrity and audit trails.
- Seamless go-live transitions without downtime or disruption to public-facing services.
- Continued post-migration support, monitoring, and optimization.

Verification

Big Picture Software can provide documentation verifying compliance with this requirement—including migration completion reports, project summaries, and client contact information—upon WVBOST's request.

Summary:

Big Picture Software has successfully migrated and supported licensing databases substantially similar to WVBOST's within the past three years, including major implementations for the West Virginia Board of Pharmacy (2023) and ongoing modernization work for the West Virginia Board of Osteopathic Medicine. These projects demonstrate our proven capability, reliability, and experience in delivering modern, secure, and fully integrated licensing systems that align precisely with WVBOST's goals and specifications.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.3.2.2**

Big Picture Software meets and exceeds the requirement of having at least **three (3) years' experience providing ongoing maintenance and support** for a licensing database substantially similar to the specifications in this RFP.

Experience with WVBOM (10+ Years)

- We have provided continuous hosting, maintenance, and support services for the **West Virginia Board of Medicine (WVBOM)** for over a decade.
- Our support has included database management, workflow configuration, reporting enhancements, security updates, and help desk support for both staff and end users.
- This ongoing engagement far exceeds the three-year minimum requirement.

Experience with WVBOP

- We also provide ongoing maintenance and support to the **West Virginia Board of Pharmacy (WVBOP)**, which operates on the Big Picture platform.
- Our services include patching, version upgrades, bug remediation, user support, and compliance maintenance (HIPAA, WCAG, PII).
- This project involves a licensing and regulatory database of comparable size and scope, and has been successfully maintained for multiple years.

Additional Professional Licensing Boards

- In addition to WVBOM and WVBOP, Big Picture Software has supported over 50 professional licensing boards across the United States and Canada, offering licensing database hosting, maintenance, upgrades, and help desk services.
- Each engagement involved supporting professional credential workflows, disciplinary case management, reporting, and data migrations.

Documentation

- Upon request, we can provide **documentation verifying our compliance** with this requirement, including references and contact information from state boards currently supported.
- These references can confirm our ability to provide long-term, reliable maintenance and support for licensing databases.

Summary: Big Picture Software more than satisfies the requirements of **4.3.2.2**. With over 10 years of direct maintenance and support for WVBOM and additional multi-year support engagements with the West Virginia Board of Pharmacy, and more than 50 other customers across the US and Canada on the same platform, we bring a proven track record of stability, continuity, and expertise that far exceeds the three-year requirement.

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.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.3.2.3**.

Ownership and Intellectual Property

- **Owner and Developer:** Big Picture Software is the original developer and owner of the licensing and regulatory management platform (currently version 6.14 next).
- Because we are the **proprietary owner**, we are explicitly authorized to **sell, service, upgrade, and support** the system proposed in this RFP.
- No third-party reseller agreements or licensing hurdles exist that could complicate WVBOM's use of the system.

Proven Authorization and Experience

- As the incumbent vendor for WVBOM (supporting the system since version 6.10), Big Picture Software has already demonstrated the ability to **transfer, upgrade, and maintain intellectual property rights** for the Board's benefit.
- We have successfully executed similar agreements with other state licensing boards, including the **West Virginia Board of Pharmacy**, ensuring legal clarity and continuity of service.

Documentation of Compliance

- Upon request, Big Picture Software will provide **formal documentation verifying our ownership** of the system's intellectual property, along with supporting materials confirming our authority to sell, service, and support the proposed platform.
- We can also supply references from agencies that have procured and successfully implemented our software under similar terms.

Summary: Big Picture Software exceeds the requirements of **4.3.2.3** by being not just an authorized reseller but the **original developer and intellectual property owner** of the proposed licensing system. This ensures WVBOM receives complete assurance that the vendor is legally authorized to provide the system, upgrades, and long-term support without limitation.

4.4 Oral Presentations (Agency Option):

The Agency has the option of requiring oral presentations of all Vendors participating in the RFP process. If this option is exercised, points will be allocated in Section 6.2 below at the time the RFP is issued, or via addendum prior to technical bid opening. During oral presentations, Vendors may not alter or add to their submitted proposal, but only clarify information. A description of the materials and information to be presented is provided below:

Materials and Information Requested at Oral Presentation:

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.4**

Big Picture Software is fully prepared to participate in oral presentations should the Agency exercise this option. We understand that oral presentations are intended to **clarify information already submitted in our proposal**, not to alter or add to it.

Materials to be Presented

If invited, our oral presentation will include the following:

- **Overview of Big Picture Software (v6.14 next):** A clear demonstration of how the upgraded platform addresses WVBOM's current limitations and enhances functionality for staff, members, and the public.
- **Implementation Plan:** A walk-through of our **8–12-month phased upgrade approach**, including project governance, milestones, data migration strategy, testing, and go-live readiness.
- **Support Model:** An explanation of our ongoing maintenance and support services, highlighting our decade of service to WVBOM and our proven ability to provide immediate and responsive assistance.
- **Security and Compliance:** A demonstration of how the system complies with **HIPAA, PII, WCAG 2.1 AA, and NIST standards**, with third-party documentation available upon request.
- **Qualifications and Experience:** A summary of our long-term partnership with WVBOM, our work with the West Virginia Board of Pharmacy, and other state licensing boards.

Presentation Team

Our oral presentation team will consist of:

- **Project Manager:** To discuss governance, implementation, and risk mitigation.
- **Solution Architect:** To provide technical insight into system functionality, integrations, and compliance.
- **Support Manager:** To explain help desk, training, and ongoing support processes.
- **Executive Sponsor:** To reaffirm Big Picture Software's commitment to the success of WVBOM's mission.

Presentation Approach

- The presentation will be tailored to address WVBOM's **specific challenges and goals**, ensuring clarity and relevance.
- We will provide **visual aids and live demonstrations** (as permitted by the Agency) to reinforce the clarity of our solution.
- Time will be reserved for **Q&A** so WVBOM staff and evaluators can seek clarification on any aspect of our proposal.

Summary: Big Picture Software will be prepared to deliver a clear, professional, and focused oral presentation if requested. Our experienced team will highlight our proven track record with WVBOM, demonstrate how the (v6.14) next solution addresses all specified requirements, and confirm our commitment to a seamless and successful upgrade.

4.4.1. The Vendor will be allocated two hours to provide a complete summary of solutions, including product and support offerings, ability to deliver the solution in the specified timeframes, and experience in providing managed and hosted modernization solutions. The Vendor should also speak to their qualifications and experience in database development, implementation and training, their authorization to resell and support, and the product's compliance with HIPAA and WCAG.

Response: Big Picture Software fully satisfies and exceeds the requirements of **4.4.1**

Big Picture Software will be fully prepared to deliver a **two-hour oral presentation** summarizing our complete solution, with content structured to directly align with the Agency's requirements.

1. Complete Solution Summary

- **Platform Overview:** Demonstrate Big Picture Software (v6.14 next), including the licensing, renewal, disciplinary, reporting, and self-service portal features.
- **Support Offerings:** Review our help desk structure, escalation protocols, and maintenance model. Emphasize continuity of service since WVBOM has relied on us for over a decade.
- **Delivery Timeline:** Walk through the **8–12-month upgrade plan**, with milestones for data migration, testing, training, and go-live.

2. Experience in Managed and Hosted Modernization

- Highlight our proven ability to provide **managed and hosted solutions** to state licensing boards, including the **West Virginia Board of Medicine** (10+ years) and the **West Virginia Board of Pharmacy**.
- Demonstrate our hosting infrastructure, uptime guarantees, and disaster recovery capabilities.
- Share examples of how modernization projects reduced manual processes, improved transparency, and increased efficiency for licensing boards.

3. Qualifications and Database Expertise

- Present our team's **certifications and experience** in database development, design, and administration.
- Outline prior work with licensing databases, including **data migration strategies, performance tuning, and audit trail enhancements**.
- Provide examples of how we have delivered **secure, scalable, and compliant database solutions** across multiple state agencies.

4. Training and Knowledge Transfer

- Describe our **training program** for WVBOM staff, including live sessions, recorded modules, and comprehensive documentation.
- Emphasize that WVBOM staff will be empowered to configure workflows, reporting, and application templates **without custom coding**.

5. Authorization to Resell and Support

- Affirm Big Picture Software's position as the **original developer and intellectual property owner** of the proposed solution.
- Confirm that no third-party reseller agreements are required; WVBOM will work directly with the system's creator.
- Provide documentation of ownership and authorization upon request.

6. Compliance with HIPAA and WCAG

- Demonstrate the platform's **HIPAA and PII compliance**, including encryption, access controls, and audit logging.
- Showcase **WCAG 2.1 Level AA compliance**, with screen reader compatibility, keyboard navigation, and high-contrast display options.
- Provide third-party compliance documentation upon request.

Summary: In the two-hour oral presentation, Big Picture Software will deliver a structured, comprehensive overview of the solution, our proven ability to modernize licensing systems, our qualifications and database expertise, our direct ownership of the platform, and our compliance with HIPAA and WCAG standards. This approach ensures the Agency receives full clarity on how we will successfully deliver the project within the specified timeframe.

4.4.2. The WVBOM will ask clarifying questions regarding the submission.

Response: Big Picture Software fully satisfies and exceeds the requirements of 4.4.2

Big Picture Software fully understands and accepts that the **WVBOM may ask clarifying questions regarding our submission** during the evaluation process and/or oral presentation.

Commitment to Transparency and Responsiveness

- We will provide **direct, accurate, and timely responses** to all clarifying questions raised by WVBOM staff or evaluators.
- Our goal is to ensure complete understanding of our proposed solution, timeline, and support structure.
- Clarifications will not alter or expand upon the proposal; instead, they will **explain, support, or confirm** details already provided.

Qualified Team for Clarifications

- **Project Manager** will address clarifications regarding the project plan, deliverables, and staffing.
- **Solution Architect/Technical Lead** will handle questions about database design, integrations, security, and compliance (HIPAA, PII, WCAG).
- **Support Manager** will answer questions about ongoing help desk, training, and system support.
- **Executive Sponsor** will confirm organizational commitment, resources, and executive oversight.

Areas of Anticipated Clarification

Based on prior RFP and oral presentation processes, we anticipate questions may focus on:

- **Upgrade Timeline:** Details of the 8–12-month phased approach.
- **Data Migration:** Strategies for ensuring accuracy, continuity, and minimal disruption.

Big Picture™ Software

- **Compliance:** HIPAA, WCAG 2.1 AA, and PII handling with third-party validation.
- **Support Model:** Immediate and long-term support availability, including after-hours and escalation protocols.
- **Qualifications:** Past performance with WVBOM, WVBOP, and other state licensing boards.
- **System Functionality:** Demonstrations of reporting, audit trail, disciplinary tracking, and portal features.

Summary: Big Picture Software welcomes the opportunity to answer clarifying questions from the WVBOM. Our experienced team will ensure that all responses are clear, accurate, and aligned with the written proposal, reinforcing confidence in our ability to successfully deliver the modernization project.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

Signature:



(Company)

Albertson Consulting Inc./Big Picture Software

(Representative Name, Title)

Troy Rauschenberger, Director of Government Markets

(Contact Phone/Fax Number)

Direct 701-660-8029 Ext 107 Fax # N/A

(Date)

12/16/2025
