SOLE SOURCE DETERMINATION

The Purchasing Division has been requested to approve a sole source purchase for the commodity or service described below. Pursuant to West Virginia Code 5A-3-10c, the Purchasing Division is attempting to determine whether the commodity or service is a sole source procurement. If you believe your company meets the required experience and qualification criteria stated below, please e-mail the Purchasing Division at team@wvadmin.gov to express your interest in the project. Please forward any and all information that will support your company's compliance with required qualification and eligibility criteria along with any other pertinent information relative to this project to the Purchasing Division no later than__08/10/06_____.

Requisition Number: INS07004

Department/Agency: Insurance Commission

Detailed Description of the Project: The vendor is to perform a high level of discovery of the existing WVIC FileNet System to determine the number, breadth, depth, and complexity of the filenet applications and corresponding data to be migrated to Intellivue. The deliverable from this discovery will be a Statement of Work for performing the migration which will include (1) Summary of all infomation gathered, (2) Summary of business needs, (3) Project Scope (4) Description of approach, (5) Description of deliverables, (6) System requirements, (7) Pricing associated with the migration.

Discovery Project Timeline estimates:
- Client Kickoff meeting
- Onsite discovery interviews (15 days after kickoff meeting)
- Statement of Work Draft Delivery (45 days after kickoff meeting)
- Statement of Work Final Draft Delivery (50 days after kickoff meeting)

State of West Virginia

PURCHASE REQUISITION

Req. No.	**INS07-004**	Req. Date	7/20/2006	Buyer 4/		PURCHASING DIVISION'S USE ONLY

FIMS Account #   7152-2007-7882-099-027

Instructions: _____

Agency/Invoice To: TEAM Code _____

WV INSURANCE COMMISSION
ATTN: ACCOUNTS PAYABLE
PO BOX 11681
CHARLESTON WV 25339-1681

Agency/Ship To: TEAM Code _____

WV INSURANCE COMMISSION
1124 SMITH STREET, ROOM 100
CHARLESTON WV 25301

This Section Only For: Releases, Direct Purchases, Emergency Purchases & Agreements

Vendor Name & Address:

INTELLINETICS, INC.
2190 DIVIDEND DRIVE
COLUMBUS, OH 43228

Commodity Code: _____

WVFIMS Vendor #:	421153	TEAM Vendor #		Bid Opening Date	Bid Opening Time
SBPO #		Terms	F.O.B.	Advertising Dates	

Item No.	Quantity	Description	Unit Price	Amount
		As per attached documentation, the vendor is to perform a high level discovery of the existing WVIC FileNet system to determine the number, breadth, depth, and complexity of the FileNet applications and corresponding data to be migrated to Intellivue. The deliverable from this discovery engagement will be a Statement of Work for performing the migration which will include (1) Summary of all information gathered, (2) Summary of Business Needs, (3) Project Scope, (4) Description of approach, (5) Description of Deliverables, (6) System Requirements, (7) Pricing associated with the migration. Discovery Project Timeline estimates: - Client Kickoff Meeting (to be mutually determined) - Onsite Discovery interviews (15 days after Kickoff Meeting) - Statement of Work Draft Delivery (45 days after Kickoff meeting) - Statement of Work Final Draft Delivery (50 days after Kickoff Meeting)		

Re-Entered in Req Track/Team

By _____ JUL 2 4 2006 Date _____

Authorized Signature	Jim Whitener	Total Estimated Value of this Requisition	

Title   Director of Administration

Suggested Vendors:
1.
2.
3.

Telephone   (304) 558-6279 x1217

Additional Vendors on Reverse Side

Table of Contents

Executive Summary

The West Virginia Insurance Commission (WVIC) has been an Intellinetics customer since 2002.

WVIC has requested Intellinetics provide a recommendation proposal to perform a high level discovery of the existing WVIC FileNet system to determine the number, breadth, depth and complexity of the FileNet applications and corresponding data to be migrated to Intellivue. The deliverable from this discovery engagement will be a Statement of Work for perform the migration which will include:

- Summary of all information gathered
- Summary of Business Needs
- Project Scope
- Description of our approach
- Description of Deliverables
- System Requirements
- Pricing associated with the migration

Statement of Work

This Statement of Work (SOW) provides a detailed description of all the services and deliverables that will be provided as part of this FileNet Migration Discovery Engagement.

Client Delivery Model

Intellinetics requests that WVIC establish a Project Team that will remain intact throughout the engagement. We recommend that the WVIC Project Team include, at a minimum, a Project Lead, a System Administrator (preferably a member/members of the IT Staff), and an End User Representative. It is important that this team be empowered with the authority to make decisions so that unnecessary project delays can be avoided.

Intellinetics follows a project management and delivery model known as "Excellence In Motion" (EIM). It follows the best practices within the industry, including methodologies and standards set forth by the Project Management Institute. Our Project Management Philosophy includes planning, execution, and control procedures that will ensure a successful engagement. If changes to project scope, schedule, or deliverables are requested by either party, appropriate change control procedures will be implemented, including the completion of a Project Change Request (PCR) and Authorization form. The impact to the project will be thoroughly documented and communicated. No change will be made to the project without both parties signing a PCR acceptance.

Project Assumptions/Constraints

We encourage West Virginia Insurance Commission to examine these assumptions closely to ensure their validity and to confirm our mutual understanding of the project. Should these assumptions not be realized or should WVIC require changes to this SOW once it has been agreed upon, Intellinetics will follow standard change control procedures, including the creation of a Project Change Request (PCR) form. Any resulting agreed upon effort must be documented, re-planned, and approved by the client and will be billed separately.

- The primary site for the discovery interviews will be at WVIC in Charleston, WV
- All onsite discovery interviews will be held across 2-3 consecutive days
- The conversion of any existing electronic or paper documents/images (including but not limited to FileNet data) is out of scope for this project
- Intellivue application design is out of scope for this project
- Third party hardware/software installation is out of scope for this project

Discovery Project Timeline Estimates[1]

• Client Kickoff Meeting	To be mutually determined
• Onsite Discovery Interviews	15 days After Kickoff Meeting
• Statement of Work Draft(1) Delivery	45 days After Kickoff Meeting
• Statement of Work Final Draft Delivery	50 days After Kickoff Meeting

Responsibility Sets

WVIC Responsibilities

- Establish a Project Lead to act as the single point of contact for the duration of the project
- Provide direction to the WVIC resources assigned to this project and ensure necessary assistance to Intellinetics Project Team
- Schedule the WVIC Project Team members to participate in the discovery interview process
- Ensure requested feedback on Intellinetics deliverables is provided in a judicious manner

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[1] All timeline estimates are in business days. Intellinetics reserves the right to adjust any project timeline estimates to accommodate resource availability. Timeline will commence upon receipt of a PO from WVIC.

<u>Intellinetics Responsibilities</u>

- Work closely with WVIC's Project Lead, System Administrator and IT Staff to ensure a delivery that complies with WVIC's IT standards
- Maintain timely and accurate project communication, written and verbal, to ensure the WVIC Project Team is aware of project status at all times
- Work with WVIC's Project Lead to resolve any concerns and/or changes to the scope of this implementation
- Provide services as outlined in the Project Scope
- Configure and install all hardware and software in accordance with this Statement of Work
- Assist and guide WVIC's Project Team with development of security parameters and system backup plan recommendations

Project Description

Client Kickoff Meeting

Once Intellinetics has been awarded the contract, a teleconference kickoff meeting will be held to cover important project milestones, including discovery interview schedule, dates, and participants.

West Virginia Insurance Commission Project Team Member Roles:

- Project Sponsor (financial stakeholder/decision maker)
- Project Lead
- System Administrator
- End User Representatives

Intellinetics Project Team Member Roles:

- Project Manager
- Technical Consultant
- Business Process Analyst
- Senior Development Architect

Discovery Interview Questionnaire & Form Development

Prior to onsite discovery interviews, Intellinetics will create Discovery Interview Questionnaires & Forms for use in the discovery interviews, including:

- Department Interviews
- Application Integration Requirements Interviews
- FileNet Architecture Review
- Infrastructure Readiness Review

The information gathered on these forms will help understand general use of FileNet within each department.

Onsite Discovery Interviews

<u>Department Interviews</u>

Intellinetics will perform five (5) 2-hour department interviews. Participating department include:

1. OOJ (Adjudication Process)
2. Board of Review (Appeals Process)
3. OP
4. Accounts Receivables
5. Self Insurance Groups

These department interviews will include an inventory of existing FileNet applications and functionality. The interviews are designed to identify the following types of information within each department:

- Number of FileNet applications
- Number of Users, User Groups Defined
- Scope of Document Types and Indexes supported
- Number and complexity of Workflows
- Number and types of Reports and Queries
- General Security Requirements/Regulatory Requirements supported
- Number and types of Reports & Queries
- Capacity Requirements (Number of docs, pages, etc.)
- Identify level of process or application specific documentation available

Application/Directory Services Integration Requirements Interviews

Three (3) 4-hour Application Integration Requirements Interviews will be conducted to discuss integration requirements for the following systems:

1. AIMS
2. Directory Services
3. BRAT and EDMS

Information of interest during these interviews will include:

- Supporting Dbase Platforms
- Interface Requirements
- Interface Capabilities/Standards supported, etc.

FileNet Architecture Review

One (1) 4-hour FileNet architecture review will be conducted. Intellinetics requests that internet access be made available for this interview to allow an Intellinetics Senior Development Architect to participate in the interview and FileNet architecture review. The review will include discussion items such as:

- How will we migrate metadata?
- How will we migrate images?
- What is the volume of data to migrate?
- Is FileNet system documentation Available?
- Is technical support available from FileNet?
- Hands-on review of WVIC FileNet architecture

Infrastructure Readiness Review

Lastly, Intellinetics will perform one (1) 4-hour Infrastructure Readiness review, including:

- Server Requirements
  - Use existing server or new server
  - Storage Requirements (SAN)
  - SQL Dbase License, etc.
- Client Requirements
  - Thick Client Requirements
  - Thin Client Requirements (if applicable)
- Login, Remote Access, etc.

Discovery Interview Analysis and Findings Documentation

Once the onsite discovery interviews have been completed Intellinetics will document all information gathered and complete all offsite research necessary to complete a Statement of Work for FileNet migration.

Deliverable – Statement of Work

A detailed Statement of Work will be created and presented to WVIC which describes all the information gathered during the discovery interviews in detail. In addition, Intellinetics will present best practice recommendations for FileNet migration. Discussion areas within the Statement of Work deliverable will include:

- Summary of Business Needs
- Project Scope
- Description of our approach
- Description of Deliverables
- System Requirements
- Pricing associated with the migration

A draft Statement of Work will be presented to WVIC for review and feedback. Mutually-agreed upon edits or modifications will be incorporated into the Statement of Work by Intellinetics before presentation of a final Statement of Work.