



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

Request for Quotation

RFQ NUMBER
 PEI08001

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 KRISTA FERRELL
 304-558-2596

RFQ COPY
 TYPE NAME/ADDRESS HERE

VENDOR

SHIP TO

PUBLIC EMPLOYEES INSURANCE
 AGENCY
 BUILDING 5
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0710 558-7850

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
01/09/2008				
BID OPENING DATE: 01/24/2008		BID OPENING TIME 01:30PM		

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				THIS ADDENDUM IS ISSUED TO:		
				1.) ANSWER THE QUESTIONS RECEIVED PRIOR TO THE MANDATORY PRE-BID MEETING (SEE ATTACHED)		
				2.) EXTEND THE BID OPENING DATE		
				TECHNICAL PROPOSAL OPENING DATE IS EXTENDED TO 01/31/2008		
				TECHNICAL PROPOSAL OPENING TIME REMAINS: 1:30PM		
				3.) MAKE AVAILABLE THE MANDATORY PRE-BID ATTENDEE LIST		
				4.) TO ALLOW VENDORS THE OPPORTUNITY TO SUBMIT IN WRITING THOSE QUESTIONS PRESENTED ORALLY AT THE MANDATORY PRE-BID MEETING DUE TO THE INAUDIBILITY OF THOSE QUESTIONS ON THE RECORDING TAKEN AT SAID MEETING. ALL QUESTIONS MUST BE SUBMITTED IN WRITING TO KRISTA FERRELL IN THE WEST VIRGINIA PURCHASING DIVISION VIA MAIL, VIA FAX AT 304-558-4115, OR VIA EMAIL AT KRISTA.S.FERRELL@WV.GOV. ALL ANSWERS GIVEN ORALLY ARE NOT BINDING UNTIL SUCH TIME AS THEY ARE ISSUED IN WRITING VIA ADDENDUM. DEADLINE FOR ALL QUESTIONS IS JANUARY 16, 2008 BY THE CLOSE OF BUSINESS. THESE QUESTIONS WILL BE ANSWERED BY SUBSEQUENT ADDENDUM AFTER THIS DEADLINE.		
				***** END ADDENDUM NO. 1 *****		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

**GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125.00 registration fee.
5. All services performed or goods delivered under State Purchase Orders/Contracts are to be continued for the term of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, this Contract may be deemed null and void, and terminated without further order.
14. **HIPAA Business Associate Addendum** - The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Covered Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division.
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Complete all sections of the quotation form.
4. Unit prices shall prevail in cases of discrepancy.
5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications.

SIGNED BID TO:

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



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

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BID OPENING DATE: 01/24/2008		BID OPENING TIME 01:30PM		

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		920-04		
DOCUMENT IMAGING AND WORKFLOW SOFTWARE						
***** THIS IS THE END OF RFQ PEI08001 ***** TOTAL: _____						

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WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

Mandatory Bidder's Conference
 Document Imaging and Work Flow Software RFP

December 19, 2007
 2:00pm

Name	Title	Company	Phone	Fax	E-Mail
Gene Mezeivitch	Sales Rep	Oracle	410 259 0611		gene.mezeivitch@oracle.com
Fred Demino	"	"	703-217-9027		fred.demino@oracle.com
Timi Scaletta	Asst. Dir. Contracts	Information Manufacturing Corporation	304-726-4407		tscaletta@imcv.com
Dale McClung	Solution Director	ITSON	304-757-9199		dmcclung@itson.com
Mike Palfrey	Systems Analyst	"	"		mipalfrey@itson.com
Dennis Bareley	TECH SALES	INTELLI POINT	304-733-3087		dennis.bareley@intelli.pointinc.com
Michael Long	Account Exec	PERCEPTIVE SW	913 667 3134		MICHAEL.LONG@PERCEPTIVE.COM
Kelly Putnam	Bus Dev Mgr	ASCENTUM	410-829-6617		kelly.putnam@ascendum.com
PAUL LANST	SEV. SALES EXEC.	MICROSOFT	404.433.7960		planst@microsoft.com
Paul Lipscomb	Dir. Sales Access Systems & Access Sys	Access Sys	304-340-4258		lipscomb@access.com
Dave Williams	Sales Exec.	Unisys	501-545-0798		David.Williams@unisys.com
David Humphrey	Sales Rep	Komax Bus	304-744-7440	744-7450	dhumphrey@komaxbusiness.com
Becky Affatt	"	"	"	"	boffa@ha.com

Mohammad Umar
 BRANDON DAXTON
 TERR. MGR. Microsoft
 (704) 612-6241
 COMPTON BUS (304) 343-5683

Name	Title	Company	Phone	Fax	E-Mail
Kent Milholland	President	NeoNexus	304-552-7121	800-870-1788	Kent@neonexuscorp.com

Questions for PEI08001

1.) The proposal cites 53 employees working across 9 functional units at PEIA. Can you tell me what number or percent of these employees will be retrieving digital documents via the CRM or otherwise at the peak level of business processing? **Approximately 60% of these employees.**

2.) The architecture diagram within the proposal depicts scanners and MFP's being used in the current environment. Can you tell me the number of scanners and their model numbers thereof? Is there a requirement to propose additional scanners? **There is currently one scanner in operation (Fujitsu M4097D). There is no requirement to propose additional scanners. This should be dependent on bidder's solution and recommendations.**

3.) Is there a requirement by PEIA to perform version control on the captured digital documents and/or add digital signatures to the documents? **There is no requirement. However, PEIA would prefer to have this option available.**

4.) Is there a need to search for documents ad-hoc by keyword and/or text? **PEIA would prefer to have this option available. Most documents will be indexed and not searchable. However, PEIA desires to have the ability to conduct text searches of documents such as contracts, correspondence and medical appeals-related documents.**

5.) Is there a need to "add" documents to the repository, as well as retrieve documents, directly from Microsoft Office products like Word? **PEIA would prefer to have this option available.**

6.) Is there a need to automatically establish users in the Document Management system by leveraging an Active

Directory/LDAP Infrastructure? **PEIA would prefer to have this option available.**

7.) From a contract perspective: Question referencing Exhibit 3 (page 2) Section 1.8.2 Contract Terms and conditions, Section 1.19 General Terms Conditions: "Microsoft and State of West Virginia successfully negotiated a Master Services Agreement (MSA) which is being currently utilized, because it was in our mutual business interests to have a common set of terms and conditions that governed our relationship, and to prevent having to renegotiate such terms and conditions on a project-by-project basis.

Thus, Microsoft is planning on taking exception to Part 1 Terms and Conditions, including Agreement Addendum (page 43), and proposing our active Master Services Agreement in lieu -will State's evaluation of Microsoft's response be adversely affected, or will Microsoft be deemed non-responsive? If unacceptable, then please provide instructions on how Microsoft can properly submit exceptions to legal terms and conditions and still remain compliant in its response to this RFP." **This is acceptable.**

8.) From a contract type perspective: Is the State requesting a "Time and Materials" or "Fixed Price" proposal?

Per the pricing sheet (Page 42 of the Original RFP), Items 1-3 require a "fixed price". Items 4 and 5 require a "fixed price" in the cost line based on the amount provide in the Description block and based on the information explained under the Item block. Item 5 is for evaluation purposes only. The labor rate provided will be used in the event of a change order/modification which is not anticipated or expected at the time of this solicitation. The agency may or may not require any change orders/modifications.

9.) Would it be possible to tell me who the incumbents are for all of the legacy IT systems that the solution needs to work with? **See RFP. BAS Eligibility system (DB2, CICS/COBOL)**

GP (Microsoft SQL Server based ERP application) WEB Enrollment and Contributions (Coldfusion based web applications, DB2/SQL Server).

10.) The title of the solicitation, as well as the requirements set forth in the RFP, lead me to believe that your team is looking a Document management solution to complement the current CRM systems at PEIA, and not necessarily an entire CRM system to be bid in conjunction with a Document Management solution. Yet, in the pricing document provided in the RFP, "CRM System" is identified as a separate line item to be costed in addition to a Document Management System. Therefore, my question is WV looking purely for a Document Imaging and Workflow solution to complement/integrate with current CRM systems? Or is PEIA looking for both a quote for an Imaging Systems and a CRM System? **PEIA is seeking a total solution that includes all associated services.**

11.) It seems that the RFP may be using the term "CRM" loosely, and not necessarily for the purposes of seeking out a pure CRM system. Is this the case? **No. PEIA is seeking a total solution that includes all associated services.**

12.) Who is your current vendor(s) and what is the current price(s) being paid by the city? **This information is available by calling the Records Department of the Purchasing Division at 304-558-2312. Vendor must be able to provide the original Purchase Order Number for the information that they are requesting.**

13.) What is the estimated total value of the contract to be awarded? **The State of West Virginia does not make available budgetary amounts for solicitations.**

14.) Who is the designated Program Manager? **The designated contact point for the procurement is J. Michael Adkins (304) 558-6244 X 230. Technical lead is Tammy Haynes (304)558-6244 X 255.**

Section: Background

15.) Can you provide additional information on the Policy and Procedure Manager system? How is this system used and what are its technical details? **This is a product of Policy Technologies International, www.policytech.com . The vendor's solution should provide the same functionality of the Policy and Procedure Manager Software. PEIA would prefer to discontinue the use of Policy and Procedure manager software if the vendor's solution can emulate the system's functionality.**

16.) **Section: 3.1 - General Requirements**

17.) 3.1.2 - Is it correct to assume the CRM Portal is an intranet solution to be used by PEIA call center. **Yes.**

18.) 3.1.2.2 - Will GP interface with CRM and setup a member when GP adds an account real-time? **Yes.**

3.1.2.4 - IVR – The business requirement is not specified. Can you provide details regarding the exchange of data between IVR and CRM? What is the customers expectation regarding how CRM should process this data? Further, is IVR also recording every conversation and saving to a database like a blob? Is CRM required to maintain association between members and their recorded conversations? **PEIA desires to have the ability for the customer service representatives to view the details of the caller prior to fielding the call based upon the caller ID or information entered by the customer via IVR system. PEIA also desires the ability to record phone calls and link the calls to the member's record.**

19.) Is there a requirement to maintain/save correlation between a member in CRM and an Oracle database? If yes, who will be responsible for creating these relationships and where do they need to be stored? Should Oracle DB have another field for CRM member GUID or should there be a

Oracle ID stored in CRM? **When referencing questions regarding the Oracle Database, no direct integration will be necessary. File transfers will be the means by which data are exchanged.**

20.) Does CRM need to report off this Oracle database as well since Cognos and SRS do this today? Will all existing reports be migrated to the CRM front-end and Cognos discontinued? **When referencing questions regarding the Oracle Database, no direct integration will be necessary. File transfers will be the means by which data are exchanged. Any reporting through CRM should be through SQL Server or DB2. Currently PEIA has SRS and Crystal. Therefore, these should be the reporting software to be used.**

21.) **Section: 3.2 - General System Specifications**

3.2.3 -Audit trail for each and every record/field update can slow down system performance in areas where speed/customer response time is a critical measure. Do you have any such specific areas/functionalities where they may be omitted? **No areas should be omitted. PEIA prefers a three second or less response time.**

22.) 3.2.4 - Are you referring to accessibility? This is offered by Windows. Can you confirm PEIA uses Windows XP/Vista? **PEIA currently uses Windows XP.**

23.) 3.2.10 - 360-degree view can be accomplished with reports. Financials is stored in GP. Is the vendor required to retrieve data from all interface sources to generate this report or is 360 view scope limited to data in CRM? Can the customer provide a list of systems and related information that 360-degree view will depend on. **All systems are listed in the RFP. The required information to get the 360-degree view on a policy holder/customer will need to be extracted from multiple systems i.e. BAS eligibility system (DB2 based system), Microsoft Dynamics GP (SQL Server based system) and Imaging Software (TBD as part of this RFP).**

24.) 3.2.12 – What metadata is logged and what level of automation is expected. **All user activity needs to be reported. System messages not pertinent to tracking user activity may be omitted.**

25.) 3.2.13 - Can we assume that research data is only text? **No. We may have images and other types of documents such as Word, Excel, and Portable Documents Format.**

26.) **Section: 3.3 - Imaging**

27.) Can we assume the vendor selected will also be able to convert Emails and Faxes? **Yes.**

28.) 3.3.11 - If known, can the customer provide clarification on external database lookups? Types of systems? How many systems? How can we communicate with these systems (SDK, web service, import files)? **This will be determined upon contract award.**

29.) **Section : 3.6 Integration**

30.) 3.6.7 – Can additional information be provided? **This is related to the Provider database. The Provider database is housed with PEIA's third party administrator. The CRM should have the ability to allow the user to link out to a TPA site and manually login while keeping the user active and in the same place as before linking out with the ability to continue activity in the CRM.. PEIA also desires the capability to track calls and correspondence from providers using the provider's identification number.**

31.) 3.6.8 - Do you require a portal for providers or a simple email parsing mechanism suffice as long as it serves your purpose? For example, an email template can be created where the customer's providers fill it and send it to an email address that will be associated with a CRM queue. **The Provider database is housed with PEIA's third party administrator. The CRM should have the ability to allow the user to link out to a TPA site and manually login**

while keeping the user active and in the same place as before linking out with the ability to continue activity in the CRM PEIA also desires the capability to track calls and correspondence (paper and email) from providers using the provider's identification number.

32.) 3.6.10 - Can additional information be provided? **Members should be able to submit inquiries directly from the PEIA website. The solution should have the ability to populate a queue with the information from the website and track the PEIA staff's actions.**

33.) 3.6.11 - Can additional information be provided? **This is referring to the usual integration methods that require tight coding to provide for API calls and the like. PEIA is interested in the vendors ability to provide loosely coupled integration negating the need for direct, tightly coded integration.**

34.) 3.6.12 - Are you referring to connecting to a Url using iframe and displaying within CRM or having the vendor develop search capability programmatically by connecting to your database directly? **See answer to question 15. Why is this question here? Are you saying that you would like the CRM solution to develop a new function to handle this?**

35.) 3.6.13 - We can pull data from Oracle for past history, however, can we assume the database is adequately indexed? Could the vendor be directly connecting to the Oracle DB or via a middle-tier component? **Vendor will not directly connect to Oracle data base.**

36.) **Section 3.8 : Appeals**

37.) 3.8.6 and 3.8.7 - Is there a unique way to identify duplicate appeals? **Appeals are identified by type and linked to the member's record.**

38.) 3.8.9 -Is this a field called appeal type or does this need to handle separate workflows for all these types of appeals? If

so, is additional information available regarding the workflows? **There are different appeal types and associated work flows.**

39.) **General Questions**

40.) The RFP communicated the requirement to the CRM solution integrate with (2) system i.e. BAS and Dynamics GP.

Could the customer provide additional details regarding the nature of these integrations e.g. type of transactions, level of complexity? **May require tight integration but the majority will be integration via file transfer only. Your integrations to BAS and GP should not be file transfer.**

41.) Can you please confirm our understanding that all end users of the CRM software in the solution will be inside of the West Virginia network and only need to use the software while connected to the West Virginia network? **Yes, excluding the need to have remote access by PEIA employees.**

42.) Please clarify if there any users of the solution who require working offline with a mobile laptop or other device which synchronizes changes with the central CRM database. **Not at this time, but PEIA would prefer to have this option available.**

43.) Please confirm there are no requirements for PDA, SmartPhone, WindowsMobile, etc. **Not at this time, but PEIA would prefer to have this option available.**

44.) Please confirm there are no requirements for the CRM Off-line client. **Not at this time, but PEIA would prefer to have this option available.**