



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
PEI80013

PAGE
1

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

RFQ COPY
 TYPE NAME/ADDRESS HERE

RECEIVED

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	F.O.B.	FREIGHT TERMS
05/01/2008				

BID OPENING DATE: **05/29/2008** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		920-04		
<p>TO PROVIDE CRM/DOCUMENT IMAGING</p> <p>REQUEST FOR QUOTATION OPEN END CONTRACT</p> <p>THE WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, THE WEST VIRGINIA PUBLIC HEALTH INSURANCE AGENCY, IS SOLICITING BIDS TO PROVIDE THE AGENCY WITH A CUSTOMER RELATIONSHIP MANAGEMENT, DOCUMENT IMAGING, AND WORKFLOW SOFTWARE SOLUTION PER THE ATTACHED SPECIFICATIONS.</p> <p>TECHNICAL QUESTION CONCERNING THIS PROJECT MUST BE SUBMITTED IN WRITING TO KRISTA FERRELL IN THE WEST VIRGINIA STATE PURCHASING DIVISION VIA MAIL AT THE ADDRESS SHOWN IN THE BODY OF THIS RFQ, VIA FAX AT 304-558-4115, OR VIA EMAIL AT KRISTA.S.FERRELL@WV.GOV. TECHNICAL QUESTION INCLUDE ANY SUCH QUESTION CONCERNIN THE ACTUAL SCOPE OF THIS PROJECT. DEADLINE FOR ALL TECHNICAL QUESTIONS IS MAY 15, 2008 AT THE CLOSE OF BUSINESS. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY, WILL BE ISSUED BY ADDENDUM AFTER THE DEADLINE. QUESTIONS CONCERNING THE PROCESS BY WHICH A VENDOR MAY SUBMIT A BID TO THE STATE OF WEST VIRGINIA ARE NOT CONSIDERED TECHNICAL QUESTIONS AND MAY BE SUBMITTED AT ANY TIME PRIOR TO THE BID OPENING AND IN ANY FORMAT.</p> <p>EXHIBIT 5</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE
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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
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>NOTICE TO PROCEED: THIS CONTRACT IS TO BE PERFORMED WITHIN 270 CALENDAR DAYS AFTER THE NOTICE TO PROCEED IS RECEIVED. THE AGENCY WILL ISSUE A WRITTEN NOTICE TO PROCEED TO THE SUCESSFUL VENDOR.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE MATERIALS OR WORKMANSHIP SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM WITH THE SPECIFICATIONS OF THE THE BID AND CONTRACT HEREIN.</p> <p>ARBITRATION: ANY REFERENCES MADE TO ARBITRATION OR INTEREST FOR PAYMENTS DUE (EXCEPT FOR ANY INTEREST REQUIRED BY STATE LAW) CONTAINED IN THIS CONTRACT OR IN ANY AMERICAN INSTITUTE OF ARCHITECTS DOCUMENTS PERTAINING TO THIS CONTRACT ARE HEREBY DELETED.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THIS CONTRACT IS AUTOMATICALLY NULL AND VOID, AND IS TERMINATED WITHOUT FURTHER ORDER.</p> <p>REV. 11/00</p> <p style="text-align: center;">VENDOR PREFERENCE CERTIFICATE</p> <p>CERTIFICATION AND APPLICATION* IS HEREBY MADE FOR PREFERENCE IN ACCORDANCE WITH WEST VIRGINIA CODE, 5A-3-37 (DOES NOT APPLY TO CONSTRUCTION CONTRACTS).</p> <p>A. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:</p> <p>() BIDDER IS AN INDIVIDUAL RESIDENT VENDOR AND HAS RESIDED CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR</p>						

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<p>() BIDDER IS A PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT VENDOR AND HAS MAINTAINED ITS HEAD-QUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR 80% OF THE OWNERSHIP INTEREST OF BIDDER IS HELD BY ANOTHER INDIVIDUAL, PARTNERSHIP, ASSOCIATION OR CORPORATION RESIDENT VENDOR WHO HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS CONTINUOUSLY IN WEST VIRGINIA FOR FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION; OR</p> <p>() BIDDER IS A CORPORATION NONRESIDENT VENDOR WHICH HAS AN AFFILIATE OR SUBSIDIARY WHICH EMPLOYS A MINIMUM OF ONE HUNDRED STATE RESIDENTS AND WHICH HAS MAINTAINED ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA CONTINUOUSLY FOR THE FOUR (4) YEARS IMMEDIATELY PRECEDING THE DATE OF THIS CERTIFICATION.</p> <p>B. APPLICATION IS MADE FOR 2.5% PREFERENCE FOR THE REASON CHECKED:</p> <p>() BIDDER IS A RESIDENT VENDOR WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES WORKING ON THE PROJECT BEING BID ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID; OR</p> <p>() BIDDER IS A NONRESIDENT VENDOR EMPLOYING A MINIMUM OF ONE HUNDRED STATE RESIDENTS OR IS A NONRESIDENT VENDOR WITH AN AFFILIATE OR SUBSIDIARY WHICH MAINTAINS ITS HEADQUARTERS OR PRINCIPAL PLACE OF BUSINESS WITHIN WEST VIRGINIA EMPLOYING A MINIMUM</p>						

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<p>OF ONE HUNDRED STATE RESIDENTS WHO CERTIFIES THAT, DURING THE LIFE OF THE CONTRACT, ON AVERAGE AT LEAST 75% OF THE EMPLOYEES OR BIDDERS' AFFILIATE'S OR SUBSIDIARY'S EMPLOYEES ARE RESIDENTS OF WEST VIRGINIA WHO HAVE RESIDED IN THE STATE CONTINUOUSLY FOR THE TWO YEARS IMMEDIATELY PRECEDING SUBMISSION OF THIS BID.</p> <p>BIDDER UNDERSTANDS IF THE SECRETARY OF TAX & REVENUE DETERMINES THAT A BIDDER RECEIVING PREFERENCE HAS FAILED TO CONTINUE TO MEET THE REQUIREMENTS FOR SUCH PREFERENCE, THE SECRETARY MAY ORDER THE DIRECTOR OF PURCHASING TO: (A) RESCIND THE CONTRACT OR PURCHASE ORDER ISSUED; OR (B) ASSESS A PENALTY AGAINST SUCH BIDDER IN AN AMOUNT NOT TO EXCEED 5% OF THE BID AMOUNT AND THAT SUCH PENALTY WILL BE PAID TO THE CONTRACTING AGENCY OR DEDUCTED FROM ANY UNPAID BALANCE ON THE CONTRACT OR PURCHASE ORDER.</p> <p>BY SUBMISSION OF THIS CERTIFICATE, BIDDER AGREES TO DISCLOSE ANY REASONABLY REQUESTED INFORMATION TO THE PURCHASING DIVISION AND AUTHORIZES THE DEPARTMENT OF TAX AND REVENUE TO DISCLOSE TO THE DIRECTOR OF PURCHASING APPROPRIATE INFORMATION VERIFYING THAT BIDDER HAS PAID THE REQUIRED BUSINESS TAXES, PROVIDED THAT SUCH INFORMATION DOES NOT CONTAIN THE AMOUNTS OF TAXES PAID NOR ANY OTHER INFORMATION DEEMED BY THE TAX COMMISSIONER TO BE CONFIDENTIAL.</p> <p>UNDER PENALTY OF LAW FOR FALSE SWEARING (WEST VIRGINIA CODE 61-5-3), BIDDER HEREBY CERTIFIES THAT THIS CERTIFICATE IS TRUE AND ACCURATE IN ALL RESPECTS; AND THAT IF A CONTRACT IS ISSUED TO BIDDER AND IF ANYTHING CONTAINED WITHIN THIS CERTIFICATE CHANGES DURING THE TERM OF THE CONTRACT, BIDDER WILL NOTIFY THE PURCHASING DIVISION IN WRITING IMMEDIATELY.</p>						

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

VENDOR	RFQ COPY
	TYPE NAME/ADDRESS HERE

SHIP TO	PUBLIC EMPLOYEES INSURANCE AGENCY BUILDING 5 1900 KANAWHA BOULEVARD, EAST CHARLESTON, WV 25305-0710 558-7850
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BIDDER: ----- DATE: ----- SIGNED: ----- TITLE: ----- * CHECK ANY COMBINATION OF PREFERENCE CONSIDERATION(S) IN EITHER "A" OR "B", OR BOTH "A" AND "B" WHICH YOU ARE ENTITLED TO RECEIVE. YOU MAY REQUEST UP TO THE MAXIMUM 5% PREFERENCE FOR BOTH "A" AND "B". (REV. 12/00) NOTICE A SIGNED BID MUST BE SUBMITTED TO: DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130 THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED: SEALED BID						

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ADDRESS CORRESPONDENCE TO ATTENTION OF:
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VENDOR

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STATE

PUBLIC EMPLOYEES INSURANCE
 AGENCY
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 1900 KANAWHA BOULEVARD, EAST
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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				BUYER:	KRISTA FERRELL-FILE 21	
				RFQ. NO.:	PEI80013	
				BID OPENING DATE:	05/29/2008	
				BID OPENING TIME:	1:30 PM.	
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID:						

CONTACT PERSON (PLEASE PRINT CLEARLY):						

***** THIS IS THE END OF RFQ PEI80013 ***** TOTAL:						_____

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**REQUEST FOR QUOTATION
PEIA RFQ#PEI80013**

GENERAL INFORMATION

Purpose:

The Acquisition and Contract Administration Section of the Purchasing Division "State" is soliciting Quotations for the Department of Administration's Public Employees Insurance Agency to provide Customer Relationship Management (CRM) and Document Imaging and Workflow software and related services.

Project:

The purpose of this project is to configure and install a robust, integrated CRM, Document Imaging and Workflow system and fully integrate with PEIA's mission critical systems using Microsoft BizTalk 2006.

Schedule of Events:

Release of RFQ.....	05/01/2008
Vendor's Written Questions Submission Deadline.....	05/15/2008
Bid Opening Date.....	05/29/2008

OPERATING ENVIRONMENT

Location

Agency is located at PEIA's offices located at State Capitol Complex, Building 5, Room 1001, 1900 Kanawha Blvd., E., Charleston, WV 25305. This will also be work location.

Background

PEIA provides health and life insurance benefits to over 211,000 West Virginians.

These members currently make up the following annual volumes:

CRM

CRM Contact Type	Volume
Telephone Calls	187,900
Emails*	445,000
Correspondence	27,300

*Includes internal email communications also.

PEIA currently administers CRM with various tools. The most utilized is the phone system. It provides basic reporting, voice-mail, call forwarding, 3 party conferencing and other functions. The agency also provides our members with an online help system that allows members to submit questions or comments via email. Currently, customer service representatives (CSR's) must enter any comments regarding customer service contacts in a database that is not integrated with the agency phone, imaging or work-flow management application.

Imaging

Currently PEIA images the following volume of documents over an annual period:

Type of Document	Volume
General Correspondence	27,300
PEIA Business Forms	283,000
Total	310,300

PEIA's current document imaging process is performed back-end. Once documents are processed by PEIA they are sent to imaging to be scanned and indexed for future reference. There is limited categorization of the scanned documents and this can create difficulty in accessing particular images when necessary.

Work Flow Management

PEIA currently has the following configuration:

Number of physical locations	1
Number of employees	53
Number of functional units	9

Workflow is administered by various non-integrated systems and a significant amount of the work is performed manually with limited tracking capabilities for items requiring prompt attention. Correspondence, telephone messages, and a relatively small volume of emails make up the majority of work items on which PEIA currently attempts work-flow management. The following table outlines the current systems and their purpose:

Type of System	Function
Microsoft Access Database – "Mail Log"	Mail receipt, tracking and disposition log
Microsoft Access Database – IT	Information Technology – System Access Tracking Tool
Microsoft Outlook	Time management tool for meeting scheduling, absence notification
Policy and Procedure Manager	Policy and procedure development and management tool

PEIA has many turn around time requirements for particular types of documents that are currently administered in the aforementioned mail log. However, healthcare claim appeals are of a particular concern to PEIA. These appeals entail workflow complexities of multiple source documents for a single appeal, multiple effective dates/times for particular documents of a single appeal and multiple personnel involvement. Further, the adjudication of these claim appeals can be critical in our members' healthcare decisions and thusly there is zero tolerance for error.

The below chart provides current mail log volume. Of the below items, the healthcare claim appeals make up approximately 10% of the total.

Mail Log System Volume	
12 Month Total of Items Logged	8,000
Monthly Avg.	667

Basic Vendor Qualifications

The Vendor must demonstrate its ability to meet the following qualifications in order to submit a quotation. Failure to demonstrate the ability to meet these qualifications will automatically disqualify the Vendor.

- The vendor must have completed an enterprise level project in a governmental agency integrating DB2 and Microsoft SQL.
- The vendor must have experience integrating systems using Microsoft BizTalk 2006 within the last two years.
- The vendor must have successfully implemented a CRM, imaging and workflow solution for a client who serves a base of 25,000 or more customers within the last two years.

Mandatory Deliverable Requirements

- The vendor will configure (customize if necessary) and implement a Microsoft Dynamics CRM 4.0 Application, or equivalent. If submitting an alternative product, the vendor must demonstrate equivalency. The State reserves the right to request an on site demonstration of any equivalent products.
- The vendor will configure (customize if necessary) and implement a Hyland Software, OnBase 7.0 Imaging solution, or equivalent. If submitting an alternative product, the vendor must an on site demonstrate equivalency. The State reserves the right to request demonstration of any equivalent products.
- The vendor will configure (customize if necessary) and implement Captaris RightFax Software 9.3, or equivalent, to complement the OnBase Imaging solution. If submitting an alternative product, the vendor must demonstrate equivalency. The State reserves the right to request an on site demonstration of any equivalent products.

- The vendor will configure (customize if necessary) and implement Kofax Ascent Capture 7.5 software, or equivalent, to complement the OnBase Imaging solution. If submitting an alternative product, the vendor must demonstrate equivalency. The State reserves the right to request an on site demonstration of any equivalent products.
- The vendor's solution must allow for all mission critical systems listed below to be integrated and accessed via the Microsoft Dynamics CRM 4.0 Application, or equivalent, portal.
 - PEIA's eligibility and premium determination system known as the Benefits Administration System (BAS). BAS is a CICS, COBOL, DB2 database mainframe application.
 - The PEIA's financial system which is Microsoft Dynamics GP version 9.0.
 - The PEIA's phone system. The phone system is a CISCO CallManager Version 4.2.3 with IP Call Center Express Version 4.x. Upon availability from the State Office of Technology, PEIA will upgrade to CallManager Version 6.0.
 - The CRM to will also interface with its Interactive Voice Response system (IVR). The IVR is a Nortel Media Processing Server (MPS) 500, operating at Release 3.0. This platform is highly scalable and is designed to support standards-compliant protocols, including VXML for voice dialogs, CCXML for call control, and SIP for IP communications. MPS 500 supports both digital and IP voice protocols, and supports the majority of commonly used host/database access methods such as SQL, DB2, 3270, flat files, etc.
 - The OnBase Hyland Software, OnBase 7.0 Imaging solution, or equivalent.
 - PEIA is currently utilizing Microsoft BizTalk 2006 to perform integrations between Microsoft Dynamics GP and the DB2 eligibility database. PEIA will continue to use the BizTalk application for other integrations inherent with the delivery of this solution.
- The vendor must provide a detailed implementation plan upon award. The implementation plan must include a full analysis of PEIA's functional requirements, a solution design phase, a solution development phase, a deployment phase, and an operation phase.
- The vendor will provide training and training materials for PEIA technical staff as well as end-users upon award. This training will include four (4) classroom style training sessions for up to forty (40) end users at the PEIA offices. The training will be four (4) hours in length. In addition to the end users, the vendor will provide one four (4) hour training session for up to ten (10) technical users. The vendor will produce all related training materials and user manuals.

- All aspects of the vendor's solution must accommodate The Health Insurance Portability and Accountability Act's (HIPAA) privacy and security standards.

Cost Proposal Format/Bid Sheets

Cost Section A: Software Purchase Price

Software	If bidding equivalent software, please indicate.	Purchase Price
Microsoft Dynamics CRM 4.0 Application or equivalent.		\$
Hyland Software OnBase 7.0 Imaging solution or equivalent.		\$
Captaris RightFax Software 9.3 or equivalent.		\$
Kofax Ascent Capture 7.5 software or equivalent.		\$
Subtotal Cost Section A:		\$

Cost Section B: Hourly Rates and Projected Work Distribution of Assigned Staff

Job Classification	Estimated Hours	Hourly Rate	Extended Cost
Project Manager	300	\$	\$
Business Analyst	300	\$	\$
Software Developer	100	\$	\$
Solution Architect	150	\$	\$
System Design Engineer	150	\$	\$
Subtotal Cost Section B:	1000	\$	\$

** The above hours are estimates to be used for bid evaluation purposes only. Actual hours may be more or less at the agency's discretion. No separate reimbursements will be made for gravel expenses associated with the fulfillment of the requirements of this Request for Quotation.

Cost Section C: Training

Training	Estimated Hours	Hourly Rate	Extended Cost
4 classroom style sessions for 40 end users 4 hours in length and 1 training session for up to 10 technical users 4 hours in length	20	\$	\$
Subtotal Cost Section C			\$

** The above hours are estimates to be used for bid evaluation purposes only. Actual hours may be more at the agency's discretion. No separate reimbursements will be made for gravel expenses associated with the fulfillment of the requirements of this Request for Quotation.

Cost Tabulation:

Subtotal Cost Section A: \$ _____
Subtotal Cost Section B: \$ _____
Subtotal Cost Section C: \$ _____

Total Cost: \$ _____

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate

DEFINITIONS:

“Debt” means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers’ compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

“Debtor” means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. “Political subdivision” means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. “Related party” means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers’ compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

LICENSING: Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State’s Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY: The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency’s policies, procedures and rules. Vendors should visit www.state.wv.us/admin/purchase/privacy for the Notice of Agency Confidentiality Policies.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), it is hereby certified that the vendor acknowledges the information in this said affidavit and are in compliance with the requirements as stated.

Vendor's Name: _____

Authorized Signature: _____ Date: _____