Mississippi Board of Chiropractic Examiners
Request for Quotations (RFQ)
For services and/or software to implement an automated License and Compliance System

1. **Purpose**

   The Mississippi Board of Chiropractic Examiners (Board) requests quotations from qualified IT professionals or organizations (Vendor) for services and/or software to implement a web-enabled licensing and compliance system with electronic payment capability. The proposed system solution must include: migration of the existing Lotus Approach databases and the Excel license file to run within a Microsoft/.Net environment, software design and development, state payment engine interfacing, website modification, system installation, testing, implementation assistance, documentation and training. The awarded Vendor must also contract with the Board to furnish ongoing technical support and services necessary to maintain the proposed system over its lifecycle.

2. **Notes of Understanding**

   The approach used in devising this RFQ is based upon the following observations, constraints and assumptions:

   2.1. The present license system is limited in functional scope and principally manual

   2.2. The RFQ is not intended to dictate the manner in which the Vendor must perform the requested services, but to establish Board and staff project expectations, scope and objectives.

   2.3. The Board acknowledges that the specifications for the requested system and services are not exhaustive. The proposed solution must address all functionality of the current system as well as provide enhancements described in this RFQ.

   2.4. These specifications are not intended to repeat Board statutes, rules or other information that is posted on the Board website. The Vendor must review the licensure and oversight-related information on the Board website, https://www.msbce.ms.gov/secure/index.asp to supplement and expand their understanding of this RFQ.

   2.5. Where necessary or practical, the Vendor must work with the Board during the design phase of this project to incorporate business rules into the developed system that govern the manner in which the automated license processing will operate.

   2.6. The licensing and compliance system must be developed to function in the state's ASP environment. The database and reporting may be developed in SQL. The resulting database will be hosted at the MS Department of Information Technology Service (ITS) Data Center. The system will operate behind the ITS firewall subject to ITS network security requirements for Remote Access via Virtual Private Network.

   2.7. The system will interface with the State's Payment Engine for electronic payment processing and accounting. All online payments will be handled via the State Portal and MSI.

2.8. The Vendor will review the State's payment processing specifications to understand interface requirements between the RFQ web data capture forms and the payment engine. This document is appended to the RFQ as Attachment B – Mississippi Payment Processing.

2.9. The Vendor is not required to address each specification in their quotation to this RFQ with a response. However, the Vendor must acknowledge that they understand and accept these specifications; address their qualifications and experience, including performance on similar projects; specify how they propose to provide the services requested and submit pricing for the proposed services. Please refer to Section 11- Instructions for Submitting Vendor Experience, Technical Services and Cost Information.

3. Project Objectives

The objectives of this project are to:

3.1. Convert existing databases and spreadsheet data into a comprehensive database to operate within an ASP SQL environment hosted at the Mississippi Information Technology Services (ITS) Data Center.

3.2. Generally, facilitate access to the Board website to enable license holders and applicants to conduct transactions electronically on a 24-hour, 7 day/week basis.

3.3. Web-enable the license application process for licensure. Licenses are issued for Doctors, Chiropractic Assistants (CA), Radiological Technologists (RT), Claims Reviewers, and Externs.

3.4. Web-enable the license renewal process for all existing license holders. Renewals are issued for Doctors, Chiropractic Assistants (CA), Radiological Technologists (RT), Claims Reviewers, and Externs.

3.5. Web-enable the Board Preceptor application process.

3.6. Web-enable Continuing Education hour tracking and allow documents to be uploaded.

3.7. Web-enable the public Complaint process.

3.8. Web-enable all as specified in this RFQ, including a change of address form and Office Information Sheet.

3.9. Automate the production of certificates, receipt issuance and correspondence associated with license processing.

3.10. Automate fee receipting and associated revenue tracking.

3.11. Facilitate digitizing and storage of photographs from licensees into their active records.

3.12. Facilitate public access to the Board's web-site for: license verification and disciplinary action using common web browsers.

3.13. Reduce manual data entry and paper filing.

3.14. Enable acceptance of web-based credit/debit card and e-check payments for licensing transactions through the State of Mississippi's payment processor.

3.15. Ensure a two-way interface with the state government portal to include, at a minimum, a confirmation response.

3.16. Update the Board's web-site pages and content to reflect new license and compliance system features as needed.

3.17. Facilitate updates by Board and staff to web-site to maintain up-to-date content, uploads and notifications.

3.18. Incorporate adequate security for the proposed system, network, and staff and customer processing.

4. Current License Operations

4.1. The Board of Chiropractic Examiners currently utilizes Lotus Approach databases that have been in production in excess of 20 years. Each of the license types (Chiropractic Doctor, Chiropractic Assistants, Radiological Technologist, Extern and Preceptor) are maintained in separate databases. A separate Excel spreadsheet is maintained to track license holder expiration dates and license numbers. An additional Excel spreadsheet is used for compliant tracking.

4.2. This system captures and tracks information on those licensed by the Board. Current license data is entered from information mailed in by applicants and license holders using license and renewal application forms.

4.3. The system's print features include production of wall certificates, small certificates, receipts, correspondence and various supplementary reports. Operations are staffed by a single user. The staff contracts for a cloud system back-up on a nightly basis.

4.4. The Board has an Internet website to allow its constituents to access policies and procedures, forms and rules for completing them, public license searches and the minutes of Board meetings. The web address for their site is: https://www.msbce.ms.gov/secure/applying-for-licensure.asp

5. Existing License File

The present databases manage a total of 735 records consisting of the following data elements:

NAME: Last Name, First Name, Middle Initial,
Degree: Applicable to the Doctor database only
PERSONAL INFORMATION: Date of Birth, Social Security Number, and School Attended
ADDRESSES: Mailing Address, (address fields include Address_1, City, County, State, and Zip Code),
CONTACT INFORMATION: - Telephone Numbers (Main and Fax); Email address
LICENSURE: License Number, PT Number, Date of Issue, License Type, Expiration Date, Status Indicator
CLINIC INFORMATION: Name of Physicians in the Clinic, Name of Clinic Employees by Designation
Board Action (text field)
Notes: Text field

Sample screens from each of the databases are provided as Appendix A.

6. Existing Office Computing and Network Platforms

6.1. The Vendor must design and develop the new system in such a manner that will allow the Board to utilize their existing office and network platforms within the new license system environment.

IMPORTANT: If, upon examining this hardware and software configuration, the Vendor believes upgrades or additions need to be made the, so specify in the RFQ response.

6.2. The Board uses an Acer workstation running Windows 7 purchased in 2014. They have 2 printers installed: a Canon IP2702 purchased in 2014 and an obsolete HP laser jet.

6.3. The Board's internet service is provided by AT&T. The Board does not operate within the ITS Data Center and is not behind the state's firewall.

7. Fees

The Board's fee schedule is listed below. These fees must be incorporated into the new licensing and compliance system.

Chiropractic License Application	$100.00
Emergency Chiropractic License Application	$100.00
Extern License Application	$100.00
Radiological Technologist (RT)	$ 50.00
Examination Fee	$200.00
Travel to Treat Fee	$ 50.00
Preceptor Intern Fee	$ 50.00
Chiropractic Doctor Annual Renewal	$200.00
Radiological Technologist (RT) Biennially Renewal	$ 50.00
Chiropractic Assistants (CA) Annual Renewal	$ 50.00
Claims Reviewer Annual Renewal	$ 25.00
Emergency Renewal Per Renewal Period	$ 50.00
Extern Renewal (Board's Discretion)	$ 50.00
Delinquent Doctor	$300.00
Delinquent CA and RT	$100.00
Renewal Card Replacement	$ 10.00
Duplicate License	$ 25.00
Out-of-State Verification	$ 25.00

*All fees should be able to be paid online

8. Current Licensing Methods and Procedures

Please refer to the Board website at, https://www.msbce.ms.gov/secure/index.asp for details regarding the manner in which their licensing and compliance rules operate, in order to supplement the information summarized below.

8.1. License Renewals

8.1.1. The Board sends email renewal notices at the end of April to license holders whose licenses are due to expire on June 30 of that year.

8.1.2. Licenses are renewed annually with the exception of the Radiological Technologist which are renewed biennially. Licensees currently submit a renewal form and fee, together with documentation of any require Continuing Education Hours (CEH) indicating that they have completed all CEHs required for the period.

8.1.3. Renewal of lapsed licenses requires licensees to apply for re-licensure provided they have completed all required CEH during the period the license had lapsed and payment of all renewal fees for the lapsed period, reinstatement cost and late fees.

8.1.4. All renewal forms accommodate updated changes of licensee information, for example: address, phone number and email address. This is currently performed by completing an Office Information Sheet. Note: There are also separate forms for name and address change, exclusive of this renewal form, that are used for changes occurring in between renewal periods.

8.1.5. Upon approval of renewed licenses, the office produces a small certificate, notification letter and receipt, and mails them to the licensee.

8.2. Applications for new license - Doctor

8.2.1. Doctor Qualifications.

An applicant desiring to become a Licensed Chiropractic Doctor of must qualify through meeting established Board educational and experience requirements, passage of the National Board of Chiropractic Examiners examination and passage of a Mississippi jurisprudence examination.

8.2.2. Application Packet Information

The applicant must complete and submit an Application Packet which includes

8.2.2.1. Completed Application Form

8.2.2.2. Official transcription of pre-chiropractic hours from the college

8.2.2.3. Official transcription of chiropractic hours from the college

8.2.2.4. Certified copy of chiropractic college diploma

8.2.2.5. Official copy of National Board scores from National Board of Chiropractic Examiners.

8.2.3. License Candidacy and Examination

8.2.3.1. Applications deemed by staff to be complete are submitted to the Board.

8.2.3.2. Applicants who the Board recommends for license candidacy are scheduled to take the Mississippi Board of Chiropractic Examiners jurisprudence examination.

8.2.3.3. Applicants meeting all criteria for licensure and approved by the Board will be licensed and receive a large certificate with seal signed by all the Board members. This is provided to the applicate upon passing the jurisprudence examination. and a receipt and mails it to the new licensee. Please note that license numbers are assigned numerically in sequence from a rolling counter.

8.2.3.4. Should the applicant fail the examination his application will reflect a status of approved pending passing next jurisprudence examination. The applicant will be notified in writing of status and re-examination requirements.

8.2.4. License Record Status

The current system does not assign a record status within the databases other than Active. Records are not added to the systems until a license is actually issued.

8.2.5. License Denial

The Board may deny any license application including but not limited to the following rationale: failure of applicant to meet all licensure requirements, failure to pay fees, and/or any of the other reasons enumerated in Section 73-6-19 of the Mississippi Code Ann.

8.2.6. Administrative Appeal

An applicant may request an administrative appeal to address any denial of licensure as specified in 73-6-19 (5) of the Mississippi Code Ann.

8.2.7. Reciprocity

8.2.7.1.1. The Board may issue a Doctor's license via Reciprocity provided the requirements detailed in Mississippi Statute are meet. The reciprocity requirements are noted on the Board's website. At the following link: https://www.msbce.ms.gov/secure/pdfs/licensure/Reciprocity.pdf

8.2.8. Renewal Requirements

Doctors must document 12 continuing education hours annually, 3 of which must be in risk management.

8.3. Application/Renewal for Certification Chiropractic Assistant (CA)

8.3.1. CA Qualifications

Applicants must have a High School diploma or GED equivalent and must submit a CA Registration form within 7 days of employment. Within the first 6 months of employment, the applicant must complete 6 hours of continuing education. A license is not issued until the 6 CEH is submitted.

8.3.2 CA Renewal Requirements

Applicants must document 6 CEH for renewal.

8.4. Application/Renewal for Radiological Technologist (RT)

8.4.1. RT Qualifications

Applicants must submit a RT Registration form and must complete 12 hours of continuing education hours within the first year of employment, 6 of which must be in radiation protections.

8.4.2. RT Renewal Requirements

Applicants must document CEH for biennially renewal.

8.5. Application for Claims Review and IME

8.5.1. Claims Reviewer Qualification

Applicants must complete the Registration form and present proof of 300 classroom hours of study in insurance claim review by a course of study recognized by the Board.

8.5.2. Claim Reviewer Renewal Requirements

Applicants must document 10 hours of continuing education in the instruction or developments in claims review approved by the Board.

8.6. Application for Chiropractic Extern

8.6.1 Extern Qualifications

Applicants must complete an application form and provide certified transcripts from the graduating chiropractic college, undergraduate college denoting 60 semester hours and National Board showing all tests passed.

8.6.2 Extern Requirements

Externs must work in a practice with a licensed Chiropractor who has been approved as a sponsoring doctor. The Extern license is valid for 6 months and may be renewed a maximum of 2 times.

8.7. Application for Preceptorship

8.7.1. Preceptor Qualifications

Applicants to serve as a preceptor at an accredited chiropractic college must complete an application form and have been licensed in the state for at least 5 years with no disciplinary action for the preceding 3 years; they must have a chiropractic office, clinic or facility with a minimum of 50 patient visits per week; and, have malpractice insurance which provides coverage for the intern. There is no fee for this application nor is there a renewal requirement.

8.8. Complaints

8.8.1. Any citizen may file a complaint against a licensed chiropractic doctor. To do so, they must secure a complaint form from either the Board office or website.

8.8.2. Upon receipt of the Complaint forms by the Board, it is entered into an Excel spreadsheet and a case number is assigned. The case is reviewed by the Executive Secretary and the attorney to determine if the Board has jurisdiction. The complaint is then addressed in the next Board meeting. Notification of the complaint and the date of the meeting where it will be addressed is provided to the license holder.

8.8.3. All Board case findings and dispositions are a matter of public record and will be placed on the Board minutes with notification given all parties to the complaint.

8.8.4. Any disciplinary sanction imposed on a complainant will be reflected on the Board website and complainant's license record Sanctions are subject to disciplinary appeal.

9. New Web-enabled License System Requirements

9.1. General Requirements

The proposed system must be designed and developed to provide the following general system features:

9.1.1. Where appropriate, screen elements should utilize drop down lists; these lists should be populated from table entries maintained by the Board's system administrator.

9.1.2. Vendor's attention is directed to table entries in the system that must include both the text name and digitized signature of the Board's Executive Secretary whose official signature must be reproduced on all renewal certificates.

9.1.3. Business rules should be enforced through screen logic and field edits.

9.1.4. Check lists must be programmed for the office staff within each phase of the automated licensure process to ensure all required documents and information are complete, alerting the staff when omissions occur.

9.1.5. Editing and correcting of data must be facilitated within the system by authorized personnel.

9.1.6. System must facilitate ad hoc query and report generation.

9.1.7. System must enable staff to perform both selective and mass mailings, including the ability to merge and print license-holders' and applicants' names and addresses on correspondence documents, on stock post cards and on mailing labels. System also must be able to generate mass emails for renewals, etc.

9.1.8. System must include housekeeping utilities for file backup, recovery, reorganization and related utilities.

9.1.9. Vendor must make a provision in the new system for downloading backup copies of the License System and database from the State Data Center on a regularly scheduled basis. It is our understanding that the State Data Center has backup capability but does not archive backup volumes. Therefore, the Board system must accommodate the downloaded backups with additional transfer to removable media for offsite storage by the Board.

9.2. License System Database Requirements

The Vendor must import existing databases and Excel license files information into a single, comprehensive, ASP SQL database. The database must be formatted to incorporate any additional data elements that must be captured and managed in order to address the needs of this new license system.

9.3. External User Access to Licensing System

The license system must furnish a means for external customers to gain secure access to the Licensing System over the Internet using common browsers. At a minimum the Vendor must provide a solution that:

9.3.1. Allows qualified users to create and manage their own user identification and password, including resolving forgotten userIDs and passwords.

9.3.2. Includes an access method and associated procedures that will enable qualified users to login with a unique user identification and password to allow them to view their own records, renew existing licenses, enter an Application Packet, file associated license documents and pay associated fees.

9.3.3. Includes directions to aid the user in pacing through the online data entry process, ensuring that all information is provided before allowing the user to complete a transaction.

9.3.4. Integrates this functionality within the Board's current web page allowing public access to content designated by the Board, including the ability to download forms and content, and verify license-holder information without requiring the individual to have a password protected account.

9.3.5. Enables the Board to create, access and update web content.

9.4. Public Use of Board License System Website

The Vendor must engineer the License system on the Board website to allow the public to perform License verification lookups, and Disciplinary action lookups as well as review Board minutes and notices. Note: The current website does not provide a means to view sanctions imposed on license holders.

9.5. Online License Renewals Requirements

The Board desires to implement a web-based license renewal component in the new system. The identified requirements for this web-based component include:

9.5.1. Each April the license renewal process begins for designated license holders. The Board notifies active license holders via email of the need to complete license renewal by June 30. The license holder must be able to complete an electronic license renewal transaction online through the Board website. Those licensees not desiring an online renewal should at least be able to enter renewal information using web forms to be printed off and submitted by mail.

9.5.2. A licensee customer/user that accesses the Board website through a common browser should be able to login and access his/her data and desired forms.

9.5.3. The Vendor must web-enable the Renewal, Lapsed License Renewal and Continuing Education Hours to facilitate online license renewal.

9.5.4. The license system must validate user logins and passwords.

9.5.5. During the system design phase of this project the Vendor must assist Board in identifying the required data elements that may be displayed but not be available for editing by online customers (for example, license numbers should not be alterable).

9.5.6. Likewise, data elements which can or must be entered or changed during the online renewal process should be identified by the Board and programmed accordingly by the Vendor.

9.5.7. When all renewal information has been entered by the customer, an electronic verification must be performed by the license system to ensure all necessary field entries have been made and the renewal application form is complete.

9.5.8. Upon the electronic verification of the data, the system should assess the online fee corresponding to the license or transaction type, and the date transaction occurs to cover late fees, if applicable.

9.5.9. Once this renewal form is complete, the customer should be routed to a separate application for collection of payment information.

9.5.10. The customer may make payment by: Visa, MasterCard, American Express, Discover or electronic check (echeck).

9.5.11. The payment information should then be provided by the customer.

9.5.12. The State of Mississippi's Transaction Processing Engine (TPE) services are hosted through Mississippi Interactive (MSI), which serves as the single point of entry for all e-commerce transactions. MSI's secure electronic payment solution has been built specifically for the state to provide complete transaction management services from payment to disbursement. The proposed license system must be appropriately interfaced with MSI for payment processing. An electronic copy of the MSI payment processing specifications is transmitted to the Vendor as a separate attachment to these specifications.

9.5.13. Upon the TPE's acceptance of payment, the license system must provide the customer an appropriate acknowledgement of receipt.

9.5.14. The license system must then automatically flag the renewed license to alert the Board. Upon their approval the system should produce a notification letter, and half-page (small certificate) with receipt to be accessed by the licensee for printing. The Board should also have access to these documents for mailing to the licensee if needed.

9.5.15. Should the TPE reject the transaction then the license system must provide the customer with notice and reason for rejection.

9.6. Applications for New License

9.6.1. Vendor must web-enable the process whereby all license applicants can apply online. Chiropractic license applicants will be required to pay the application fee prior to receiving access to an online Application Packet. NOTE: A copy of the application packet will be requesting vendors.

9.6.2. The process should be engineered to allow applicants to enter their information online and upload all required documentation, including transcripts, examination documentation and color passport style photos.

9.6.3. The system must enable the applicant to pay their application fee online.

9.6.4. Upon receipt of a fully complete online Application Packet with all required documentation, the Board must be able to approve the applicant as a candidate for jurisprudence examination and issue him/her an appropriate notification to sit for the examination. The notification must include date, time and location of the examination.

9.6.5. Upon a candidate's successfully passing the examination and fulfilling all licensing requirements, the Board will approve the candidate for licensure and the system must generate notation informing the applicant of the application status.

9.6.6. The system should generate an 8 ½ by 11 wall certificates with seal and names of the current Board members for signature to be manually affixed upon completion of examination.

9.7. Renewal Applications.

9.7.1. Vendors must follow the steps outlined above for License Renewal Requirements, in designing and developing code to web-enable this process and link it to the electronic payment process.

9.7.2. It is highly desirable for the Vendor design and develop a means to enable applicants to append and upload transcripts to document CEH required for renewal.

9.7.3. The system should provide email notification to all license holders upon meeting the requirements for renewal as verified by Board personnel.

9.7.4. It is highly desirable for the system to allow the licensee to download their documentation for successful renewal upon notification of renewal. Documents may include small certificate with signature of the Executive Secretary manually affixed and receipt of payment.

9.8. Complaints – Online

9.8.1. The Complaint process must be automated to enable concerned parties to file a Complaint form via the website.

9.8.2. The system must then assign the complaint a case number and log it into a case file for processing by the Board.

9.8.3. The resulting investigative findings, case proceedings and disposition must be logged by the system.

9.8.4. The outcome of the case must be included in the Board minutes, the complainant's record must be update and the website must be updated with this information.

9.8.5. The Board presently requires that the complaint form be notarized prior to submission. The Board must deliberate as to whether they will waive this requirement for forms that will be entered online as part of the electronic transaction.

9.9. Update Information Online

Address change and Office Information forms should be available online and all changes should update the licensing system files.

9.10 Revenue Tracking Requirements

9.10.1 The financial records of the Board are maintained by the Mississippi's Accountability System for Government Information and Collaboration (MAGIC) managed by the Mississippi Management and Reporting System (MMRS) and the Department of Finance and Administration (DFA). The MAGIC system provides the financial records of the Board including the general ledger, payroll, purchasing, budgeting, accounts payable, and reporting functions. The requested revenue tracking system is not intended to replace or duplicate MAGIC transactions. All revenue received by the Board is recorded and deposited into a clearing account maintained at a local bank. All funds deposited in the bank must be transferred daily to the State Treasury and entered into MAGIC. The developed license database will not require an interface to MAGIC for revenue received and tracked.

9.10.2 The Vendor must develop the following revenue tracking features in the license system for both regular office receipts and payments made through the State electronic government portal. Revenue must be tracked by:

9.10.2.1 Payment method: currently fees are paid with a cashier's check or money order. The proposed system must also include fields indicating that the payment was received online.

9.10.2.2 Date

9.10.2.3 Amount

9.10.2.4 Type of fee, for example: license type (new, renewal, reinstatement), late fees, and other classifications.

10 License System Project

10.1 RFQ released via email to Vendors: Monday, March 12, 2018

10.2 Questions, if any, due from Vendors by: 1pm CST, Monday, March 19, 2018

10.3 Official responses from questions sent to Vendors: Thursday, March 22, 2018

10.4 Sealed quotes due to Board Office by: 1pm CST, Wednesday, March 28, 2018

10.5 Award notice sent to Vendors: targeted for Monday, April 2, 2018

10.6 Project initiation and milestones: to be jointly developed based on project work plan

10.7 Project testing, acceptance and completion to be jointly developed based on project work plan. Desired date is Friday, August 31, 2018.

11 Instructions for submitting Vendor experience, technical services and cost information.

11.1 Background and Experience -the Vendor must provide a description of his/her organization, substantiating proven expertise in the products and services being proposed in this RFQ for all phases of the project. Information to be provided includes:

11.1.1 The location of the Vendor's principal office and the number of professional personnel employed therein.

11.1.2 The number of years the Vendor has been in this business.

11.1.3 The corporation's name and the state of incorporation, if incorporated.

11.1.4 The organization's size (e.g., employees, offices, locations) and structure.

11.1.5 Contact person for RFQ, including: mailing address, email address and telephone number

11.1.6 The Vendor's project principals designated for this engagement.

11.1.7 The Vendor's experience in cooperative efforts with State Data Center and/or DFA staff.

11.1.8 The Vendor's experience in providing proposed products and services.

11.1.9 The names and contact information of references from three active accounts of the Vendor, preferably in developing licensing systems for Mississippi boards and commissions. Highly desirable are the names of live websites that the staff may review to substantiate the quality of Vendor's work.

11.2 Technical Services - the Vendor must provide a description of the proposed services which includes at a minimum:

11.2.1 What approach they plan to take on this project including describing all issues they believe to be pertinent to this undertaking.

11.2.2 Methodology for designing, developing, and implementing the proposed system.

11.2.3 The timeline for completion of the initial project, incorporating the necessary Board commitment in this schedule.

11.2.4 The Vendor should comment on their experience with the variety of forms web-enablement that will be required in this project.

11.3 Cost

Vendor must submit a total fixed dollar cost for all services and products requested in this RFQ. Cost quotation must include:

11.3.1 One-time cost to cover: analysis and design services, migration of existing files and records, interfacing system with existing Board website, development of software, installation of software, training of staff and full documentation.

11.3.2 Annual cost to furnish the Board with software support coverage for the proposed licensing system upon final system acceptance. Services include:

11.3.2.1 Providing telephone support for license system issues.

11.3.2.2 Providing on-site support as needed.

11.3.2.3 Providing ongoing annual software license support, including updates and new releases.

11.3.3 Costs must be inclusive of travel, lodging, subsistence and any other expenses related to working onsite with the Board.

11.3.4 In addition, the Vendor must propose an hourly rate for performance of ongoing enhancements to the Licensing System for future consideration by the Board. This hourly rate must be fully-loaded, to include: travel, lodging, subsistence and any other expenses.

11.3.5 Vendor's proposal must include the length of time for which this pricing is guaranteed.

12 RFQ Proposal Evaluation Criteria

Each proposal submitted in response to this RFQ will be evaluated by a Board review team based upon the following criteria:

12.1 Vendor Background and Experience

12.2 Proposal Quality and Content

12.3 Vendor Active Account References

12.4 Project Cost – including initial cost, annual support and hourly consulting rate

13 Sealed responses to this RFQ should be submitted in triplicate by 1pm CST, Monday, March 19, 2018 to:

Dr. Richard Walker, Executive Director
Mississippi Board of Chiropractic Examiners
PO Box 775
Louisville, MS 39339
Phone: 662 773.4478
Email: msbce@bellsouth.net

14. Contact Information

Important: from the issue date of this RFQ until a Vendor is selected and the bid award is announced, all responding Vendors and their representatives may only use the project manager named below as their sole contact regarding this RFQ. Any subsequent clarifications or interpretations of this RFQ will be made in writing by the project manager through the Board's Executive Director.

Please direct questions regarding this RFQ to the Board's project manager:

Ms. Denise De Rossette
Cornerstone Consulting Group
101 Merlot Cove
Clinton, MS 39056
Phone: 601-540-4485

Email: Denise@cornerstonems.org

THE MS DC Database

LAST NAME | FIRST NAME | MIDDLE | DEGREI | SEX | DOB | SSN

CLINIC NAME: Clinic

OWNER: C.

ADDRESS 1ST LOCATION

ADDRESS 2ND LOCATION

MAILING ADDRESS

CITY: L

STATE: MS

ZIP

PHONE

FAX

DRS IN CLINIC | DRS #2 | DRS #3 | DRS #4

CAS IN CLINIC | CAS #2 | CAS #3 | CAS #4 | CAS #5 | CAS #6

RTS IN CLINIC | RTS #2 | RTS #3 | RTS #4 | RTS #5 | RTS #6

UCS IN CLINIC

COUNTY

email address: [illegible]

LIC #: 407

PT #: 272

DATE REC'D: 1/8/1977

FACT SHEET REC'D: 6/30/2017

LIC TYPE: MBCE

EXP DATE: [illegible]

BOARD ACTION: none

STATUS: A

GRADUATE OF: Palmer Chiropractic College

CA List

CERT #:	DATE REC'D:	FIRST NAME:	LAST NAME:	DR. NAME:
1625	6/28/2012			

ADDRESS:	CITY:	STATE:	ZIP:	EXPIRES
	D'Iberville	MS	38540	6/30/2013

CE HOURS

Active

Rad Tech List

CERT #:	DATE REC'D:	SS#:	FIRST NAME:	LAST NAME:
106	7/1/1997			

DR. NAME:	ADDRESS	CITY	STATE
			MS

ZIP	EXPIRES
39648	6/30/2004

PRECEPTORS

Certificate Number: 100

First Name:

Last Name:

Address:

City,State,Zip:

Sponsoring Doctor: BMR Chiropractic

Notes:

4.23.09 - issued preceptorship temporary license

Extern Database

Extern Cert. #

100

First Name

Last Name

Degree

Address

City,state,zip

Grenada, MS 38902-1291

Sponsoring Doctor

Notes

Issued: January 2004
Renewals: 07/24/2004; 01/27/2005; 6/30/2005; 01/26/06; 01/25/07
Issued License to practice in the state of Mississippi on 07/26/2007.

Mississippi Interactive (MSI) will serve as the single point of entry for all e-commerce transactions. Awarded vendor will use Mississippi's official payment processor for any of the following services where payment is required.

- Web services
- IVR services
- Mobile services
- Over the counter payment processing services
- Kiosk services
- Lock Box services

The following payment methods accepted through MSI include: Visa, MasterCard, American Express, Discover, electronic check and subscription (monthly billed).

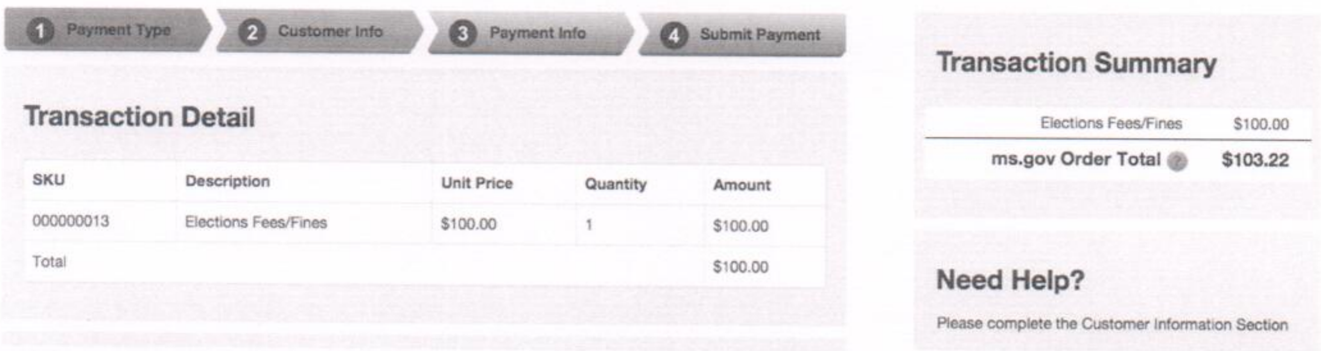
DFA Administrative Rule
The Department of Finance and Administration (DFA) established an administrative rule to be followed when agencies, in accordance with §27-104-33, Mississippi Code of 1972, Annotated, elect to accept payment by credit cards, charge cards, debit cards, electronic check (echeck) and other form of electronic payments for various services and fees collectible for agency purposes. See Attachment 1 for Final Rule.

Payment Card Industry (PCI) Compliance
MSI will be responsible for Payment Card Industry (PCI) compliance on behalf of the State, though any future change in Federal PCI standards may require additional support from the State entity and awarded vendor. MSI's Transaction Processing Engine (TPE) is certified compliant with the PCI Data Security Standard (DSS) and compliant with the Payment Application Best Practices (PABP) standards. It is also listed as a Validated Payment Application by VISA. TPE is hosted at NIC's Central Data Center in Ashburn Virginia and complemented with a backup facility in Allen, Texas. NIC is certified by PCI-DSS as a Level 1 Service Provider for this environment.

See Technical Requirements for notes to the PCI compliance responsibility of the awarded vendor.

Awarded vendor is prohibited from breaking out payment processing fees associated with any transaction. This includes all pages of the application and/or any receipt generated.

Acceptable fee break out can include a "subtotal" for services and a "Total ms.gov Price" or "ms.gov Order Total" which includes the eGov processing fee. See image below for example.



Merchant of Record
In order to act as the single point of contact between the State, MSI, the payment processor, the

merchant acquiring bank, and end users of ms.gov services, MSI will be the "Merchant of Record" for this RFP. As the single point of contact for the State, MSI will work directly with the processor and the acquiring bank to request and set up merchant accounts and will be responsible for all areas of merchant services, including merchant fees.

eGov Transaction Fees
There will be standard payment processing fees associated with each payment transaction. Customer approval (electronic or otherwise) of MSI payment processing fees will be obtained prior to initiating payment.

MAGIC
MSI's payment solution processes is integrated with MAGIC, Mississippi's statewide accounting and procurement system of record. At least three (3) weeks prior to service launch Customer will be required to work with DFA to set up corresponding charges table entries. After appropriate edits are made to the charges table, Customer and awarded vendor will be required to work with MSI to insure adequate testing, confirming the application transactions are posting to MAGIC. A live transaction test must be completed no later than three (3) business days before service launch.

Refunds, Chargebacks, Returns
As the merchant of record and official payment processor, MSI will handle all refunds, chargeback representments and returned echecks. However, MSI is not responsible for covering any monies that must be netted from the agency's account through refund, successful chargeback or returned echeck. Below are the processes for each.

<u>Refunds</u>
The refund process is initiated by either customer or agency request.

- Upon customer request MSI will contact the agency financial contact (established at project initiation) for approval prior to refund
- Agency contacts have access to and are encouraged to use the MSI refund tool for their refund requests. This ensures adequate logs of all requested refunds
- After agency request or approval MSI refunds the charge in TPE and notifies the requestor upon completion
- Through MAGIC refunds are netted from the next day's deposits or the next day funds are available to net from

<u>Chargebacks</u>
A chargeback is a monetary dispute that is initiated by the Issuing Bank (issuer disputes the posting of the transaction) or the cardholder (a cardholder disputes a transaction).

- Customer or card issuing bank sees what appears to be a suspicious charge on their statement.
- The customer contacts the card company to dispute the charge and initiate the chargeback process. Note: depending on the company policies of the company that issued the card the company may initiate the chargeback without customer notification.
- MSI receives a chargeback email from our processor notifying us of the transaction details of the chargeback. Once this notification is received the processor pulls the funds back from the Portal account until supporting documentation is obtained. (MSI's processor has 45 days from the time the customer disputes the charge to contact MSI for additional information.)
- Based on the information provided in the chargeback notification MSI researches the charge internally first.
    - If the disputed charge is a true duplicate charge (same customer information, amount, etc), MSI allows the chargeback to process and it is automatically marked in TPE.
    - For all non-duplicate charges MSI contacts the appropriate agency contact(s) (financial contact gathered at project initiation) by email to explain the chargeback, provide

charge details and verify with the contact that it is a valid charge. If needed MSI requests the agency provides any additional information they may have to support the claim.

- If the charge is valid MSI will provide the sales drafts (chargeback receipt, TPE receipts, agency support etc) back to the processor to support the charge validity.
- After the charge is verified through receipt of sales drafts the chargeback will be reversed and the funds will be deposited back to the agency.

Note: The chargeback process could take up to 60 days to resolve.

Returns

Electronic checks (echeck)/ACH payments (where a user enters an account and routing number) may be returned unpaid for any reason, including non-sufficient funds (NSF), stop payment, online data entry error or closed account. A full list of return codes is listed below:

- R01 - Insufficient Funds - Available balance is not sufficient to cover the dollar value of the debit entry.
- R02 - Account Closed - Previously active account has been closed by customer or RDFI.
- R03 - No Account/Unable to Locate Account - Account number structure is valid and passes editing process, but does not correspond to individual or is not an open account.
- R04 - Invalid Account Number - Account number structure not valid; entry may fail check digit validation or may contain an incorrect number of digits.
- R05 - Improper Debit to Consumer Account - A CCD, CTX, or CBR debit entry was transmitted to a Consumer Account of the Receiver and was not authorized by the Receiver.
- R06 - Returned per ODFI's Request - ODFI has requested RDFI to return the ACH entry (optional to RDFI – ODFI indemnifies RDFI).
- R07 - Authorization Revoked by Customer - Consumer, who previously authorized ACH payment, has revoked authorization from Originator (must be returned no later than 60 days from settlement date and customer must sign affidavit).
- R08 - Payment Stopped - Receiver of a recurring debit transaction has stopped payment to a specific ACH debit. RDFI should verify the Receiver's intent when a request for stop payment is made to insure this is not intended to be a revocation of authorization.
- R09 - Uncollected Funds - Sufficient book or ledger balance exists to satisfy dollar value of the transaction, but the dollar value of transaction is in process of collection (i.e., uncollected checks) or cash reserve balance below dollar value of the debit entry.
- R10 - Customer Advises Not Authorized - Consumer has advised RDFI that Originator of transaction is not authorized to debit account (must be returned no later than 60 days from settlement date of original entry and customer must sign affidavit).
- R11 - Check Truncation Entry Returned - used when returning a check safekeeping entry; RDFI should use appropriate field in addenda record to specify reason for return (i.e., "exceeds dollar limit," "stale date," etc.).
- R12 - Branch Sold to Another DFI - Financial institution receives entry destined for an account at a branch that has been sold to another financial institution.

Typical Return Process

- User enters echeck information in the ms.gov common checkout page
- TPE captures the information and sends to payment service provider
- The service provider submits a request to the payer's bank to retrieve the funds
- Payer's bank reports back one of the aforementioned return codes to the services provider
- Service provider notifies MSI and the return is marked in TPE
- Funds are electronically pulled from the agency through the daily MAGIC payment interface file. MSI contacts the individual(s) responsible for agency funds (contact obtained during project initiation) by email to let them know of the return and reason.

Hardware Acquisition
Due to the payment key injections required for hardware to be compatible with MSI's PCI compliant payment processor, any hardware must be acquired through MSI's existing eGov contract. This includes, but is not limited to, kiosks, pin pad/card swipe, mobile devices etc.

Application Testing
For all new services DFA requires a test transaction to be run for flow of funds and processor verification. After MSI receives confirmation the awarded vendor is satisfied with the integration, one test must be run through production TPE and confirmed by MSI.

It takes three (3) business days (excluding bank holidays) for the transaction to be confirmed by DFA. Awarded vendor should take this time frame into consideration when anticipating launch date.

Reporting
TPE provides reporting and auditing tools useful for streamlining and accommodating various back-office procedures. TPE's financial reporting is comprehensive, flexible, and robust. Within TPE all payment processing data is made available via a wide variety of reporting features. Reports are real-time, up-to-the-minute transaction reporting ranging from summary reports to detail reports showing line-item level data. A comprehensive users guide and applicable training will be provided to agency contacts during integration.

Payment Support
Mississippi Interactive will provide support for all user payment inquiries. MSI is located at 2727 Old Canton Road, Suite 100, Jackson, Mississippi 39216 and customer payment support is available during normal business hours (Monday – Friday 8:00 a.m.-5:00 p.m. CST). MSI's toll free support number (1-877-290-9487) is listed on the ms.gov Common Checkout page and is accessible to all users. For payment emergencies a technical support cellular number will be provided to the State contact.

MSI will work directly with the awarded vendor and/or the agencies to identify, report, track, monitor, escalate, and resolve any technical issues with TPE or CCP. It is MSI's policy to notify all awarded vendors and agencies of planned maintenance windows or system updates to avoid any payment issues.

State entities and/or awarded vendors will not be charged for MSI's efforts during payment implementation or any training/support.

Technical Requirements
Mississippi's payment solution is designed to provide two methods of integration: CommonCheckout (where the user clicks on a "Pay Now" button and is transferred to a set of common checkout pages branded for ms.gov), and DirectConnect (where the application has self-contained checkout pages and will call TPE for verification and capture once all payment information has been entered). In both of these instances, the awarded vendor will utilize standard web services protocols.

The CommonCheckout integration is required by ITS and DFA. Should special circumstances arise where the CommonCheckout is not applicable and/or the DirectConnect option is required, approval from both State agencies is mandatory.

High level descriptions of the integration requirements are included in this section. For detailed documentation please contact Derrick Cole, Mississippi Interactive's Director of Technology, at derrick.cole@msegov.com.

CommonCheckout (CCP)
When utilizing CommonCheckout, the calling application is not responsible for collecting the credit card or banking information. Instead, the application sends the transaction data to the CommonCheckout

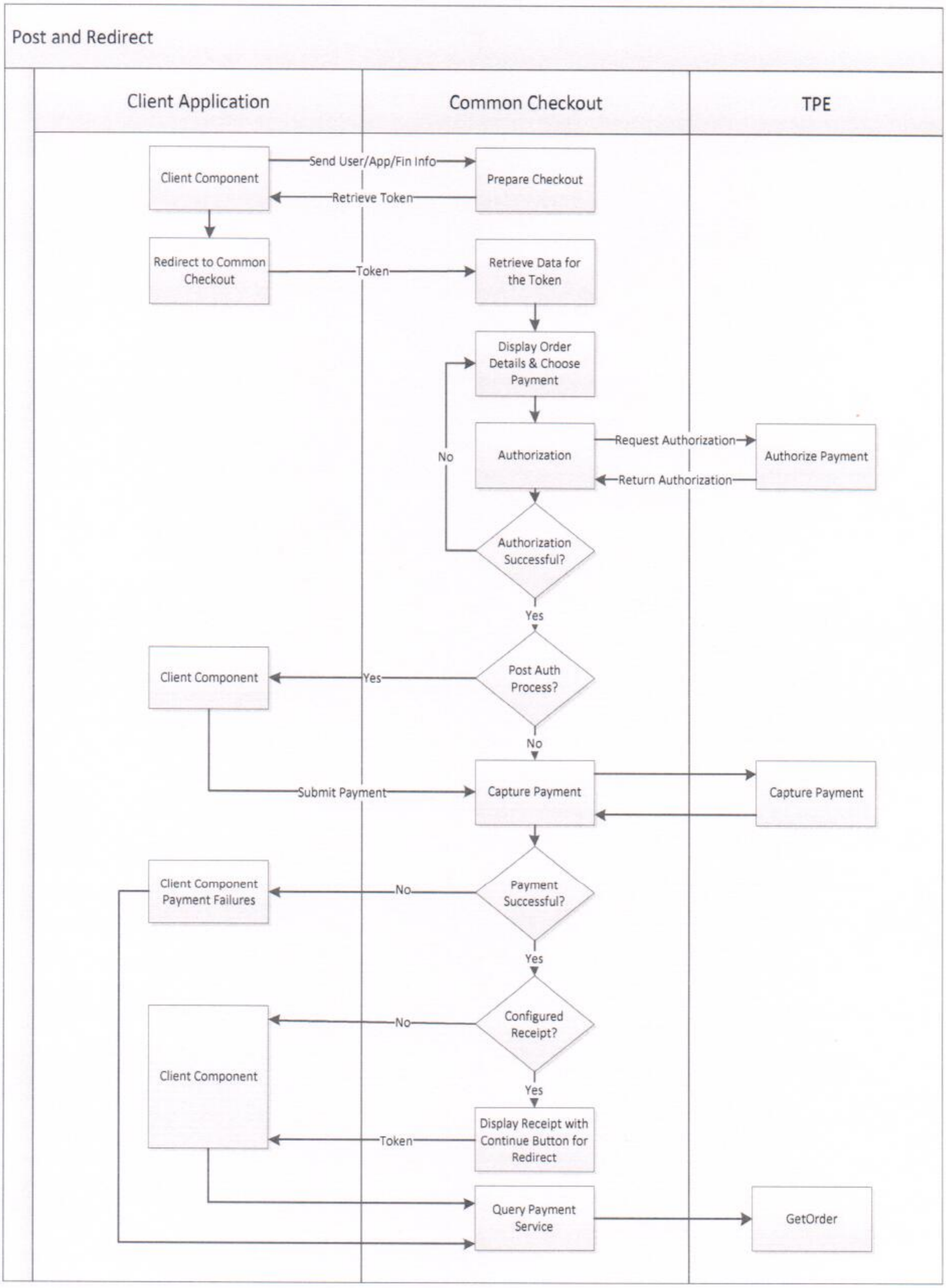
interface which collects and processes all payment information. The CommonCheckout interface will then return to the calling application all transaction status details and information related to the transaction.

CCP Option 1: Server-side Web Service Calls and Browser-side Redirect

The partner application is required to invoke Prepare Checkout Operation on the Common Checkout web service that is passing along the financial/customer/application information.

- The Web Service operation returns a token back in the SOAP response. The token is required as a hidden field on the form post to the Common Checkout web application or a redirect.
- The Prepare Checkout Service returns the token back. This token is required as a hidden field on the form post or query string to the Common Checkout web application.
- When the customer chooses to continue with the payment by clicking a form button on the partner screen, the browser redirects to the Common Checkout web application.
- The Common Checkout web application retrieves the customer/financial/application data associated with the token and displays it on the payment page.
- Upon submission of the payment, Common Checkout redirects to the partner application or displays a receipt page, based on the configuration. In the latter case, the redirect to the partner application happens when a customer clicks a button on the receipt screen.
- The partner application is required to do a call back to the Query payment web service by sending the token. The service will return the transaction information back in the SOAP response. This ensures authenticity of the payment.

The following figure outlines a typical process flow for a CommonCheckout transaction.



CCP Option 2: Server-side Name-Value-Pair HTTPS Posts and Browser-side Redirect

The partner application is required to send the financial/customer/application information as multiple name/value pairs using HTTPS POST to the Prepare Checkout Post URL.

- The Prepare Checkout Service returns a token-based transaction identifier, which is required as a hidden field on the form post or query string to the Common Checkout web application.
- When the customer chooses to continue with the payment by clicking a form button on the partner screen, the browser is redirected to Common Checkout web application.
- The Common Checkout web application retrieves the customer/financial/application data for the transaction identified by the associated token and displays it on the payment page.
- Upon submission of the payment, Common Checkout redirects to the partner application or displays a receipt page, based on the configuration. In the latter case, the redirect to the partner application happens once a customer clicks a button on the receipt screen.
- The partner application requires a call back to the Query payment HTTP service by sending the token. The service returns the payment detail back as name value pairs. This ensures authenticity of the payment.

DirectConnect

The second scenario is to use the Application Programming Interfaces ("API's") that are available to developers. In this scenario, agency or third party developers write applications that include the checkout pages. Customers fill out all payment information within the application, and once captured, the application communicates with TPE using a standard API. TPE processes the payment, based on payment type, and returns either a success or failure code back to the calling application. Based on the code, the calling application displays either a receipt back to the customer or the reason for the failure. TPE supports multiple API's including:

- Java
- .NET
- Perl
- PHP

Note: If the DirectConnect method is approved by ITS and DFA the awarded vendor must provide MSI and the State proof of their software's (and any applicable hardware) PCI compliance.

DirectConnect Integration Outline
Before a payment can be processed inside of TPE, an *Order* must be established. An Order is the basic transaction container in TPE. It is a detailed request for certain goods or services and represents all the instructions and information needed from the customer for the merchant to collect money. An order contains information about the customer, items purchased, fees and taxes, payment information, billing address, shipping address, and so forth.

TPE uses the term *order*, along with the terms *payment* and *credit* to represent payment data for all electronic payments. An order is created by the client application while the customer is placing an order for goods or services. Transactions flow between the merchant and the financial institution during the life cycle of the order. These transactions can be broken into two broad categories: *payments* (monies transferred to the merchant from the customer) and *credits* (monies returned to the customer, such as when goods or services are returned and payment is refunded). As order processing continues, payments and credits are created and modified.

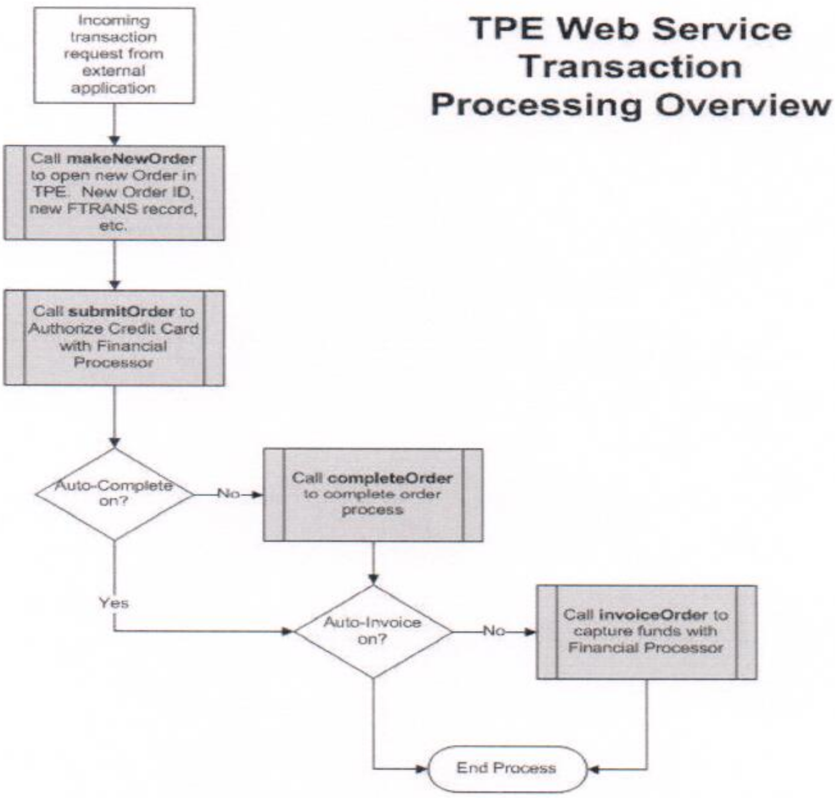
The basic steps for creating an Order and processing a payment are as follows:

1. Submit a new Order Request to TPE. The client application will create a request that includes a Merchant Id, a Merchant Key, and a Service Code. These are pre-defined security parameters that are configured within TPE. If the request is successful, TPE will return an empty order

container to the client application.

2. Inside of this container, the application will set the Payment Implement (Credit Card, ACH, Cash, etc.), customer payment information, billing information, transaction line items and amounts, and any other information necessary for processing the payment.
3. Submit the Order. Once the Order container has been filled by the calling application, it will be submitted for authorization. TPE will do preliminary validations on the Order before submitting it to the Merchant Service Provider for authorization. If there is an error with the Order, TPE will return that information back to client application, or it will return back that the authorization was successful.
4. Complete the Order. This call to TPE informs the system that the order is complete and ready to be invoiced.
5. Invoice the Order. This step is where money transfer (i.e., Capture) is initiated. The invoice takes the information from the Order, and is then submitted to the Merchant Service Provider for Capture/Settlement.

The following figure outlines a typical process flow for a Direct Connect transaction.



Charges Table Connection

The Mississippi Department of Information Technology Services (ITS) has developed the Mississippi Charges Web Service to supply application programs with data from the charges table. This data is required by the Agency application to build a valid MSI electronic payment request. The item type, item description, and item cost, for each item sold, must be submitted in the transaction request for payment authorization.

Service Use

The primary purpose of the web service is to provide the charges data for a requested application. The method that performs this function is getCurrentCharges and requires a chargesInput object as the input parameter. A getCurrentChargesResponse object is returned.

- getCurrentCharges(chargesInput)

DFA updates the charges table each night just before midnight. The agency application is responsible for obtaining and using the current charges information. Good practice is to obtain the charges data at least daily.

Charges Use in MSI Common Checkout

The ChargeItem data will become the basis for a line item that is sent to the CCP in the Prepare Checkout call. The table below maps the line item fields referenced in the CCP interface to their related ChargeItem value. In the CCP Prepare Checkout service call, line items are sent in as an array of lineItems.

CCP Line Item element	**Field Description**	**Field used from Charges Item**
LineItem.SKU	Item identifier used in backend SAAS funds distribution.	ChargeItem.itemType
LineItem.Description	Description of the item being purchased.	ChargeItem.description
LineItem.Unit_Price	Cost of 1 of this item.	ChargeItem.amount
LineItem.Quantity	Quantity of the item being purchased.	Computed by the application.