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## Notice of Intent to Certify Sole Source

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**To:** Interested Parties

**From:** Michele Blocker, Interim Executive Director

**CC:** ITS Project Number 45793

**Date:** August 11, 2020

**Re:** Sole Source Certification Number 4328 for CaseExpert maintenance, support, and enhancements for the Mississippi Department of Rehabilitative Services (MDRS)

**Contact Name:** Justin Faucette

**Contact Phone Number:** 601-432-8165

**Contact Email Address:** [Justin.Faucette@its.ms.gov](mailto:Justin.Faucette@its.ms.gov)

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### Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 4328 for the Mississippi Department of Rehabilitative Services (MDRS), please be advised that ITS intends to award MicroPact Global, Inc. as the sole source provider of CaseExpert maintenance, support, and enhancements through September 30, 2021, in an amount not to exceed \$327,800.00. If no objections are received, then this sole source certification will be valid until September 30, 2023. Please be advised that ITS will determine if additional support or enhancements are within scope during the certification period and may increase the spending authority accordingly. Should MicroPact Global, Inc. change their name during this certification period, then ITS will determine if a recertification is necessary. For an explanation regarding Mississippi state law, policy and procedures for sole source procurements, refer to Attachment C: Sole Source Procurement Overview.

### Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:

**CaseExpert is the case management system used by the Disability Determination Services (DDS) of MDRS to process approximately 77,000 disability claims per year. CaseExpert is a disability case processing system used to process disability claims following the Social Security Administration's (SSA) Program Operations Manual. The MicroPact solution is critical in supporting and enhancing the efficiencies of the disability case processing systems, interfaces, and processes in support of SSA's Electronic Folder. These enhancements allow for the receipt and processing of additional data elements from the Electronic Folder and changes to the interface.**

The enhancements provided through this certification are used to address small functionality changes needed in the software that are unique to Mississippi legal requirements. The customer's sole source certification request is included as Attachment A.

2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:

**CaseExpert has been in production in the Disability Determination Services (DDS) since 1995. DDS relies heavily on this system, which provides automation of the disability case processing process, to meet processing goals established by SSA. MicroPact Global, Inc. is responsible for federally mandated changes to CaseExpert. The purpose of the DDS is to provide support to SSA in the processing of disability claims. CaseExpert is the means by which DDS can provide this support. CaseExpert also assists with scheduling of appointments, producing correspondence for claimants and the attending physician, and making payments; this functionality is not available in ordinary scheduling programs. MDRS has made the business decision to continue using the CaseExpert software product by MicroPact Global, Inc. The customer's sole source certification request is included as Attachment A.**

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

**CaseExpert is a proprietary product available only from MicroPact Global, Inc. No other organization or individual has the right to sell, license, modify, or support the system. The Vendor's sole source certification letter is included as Attachment B.**

### Schedule

| Task                             | Date                                 |
|----------------------------------|--------------------------------------|
| First Advertisement Date         | 08/11/2020                           |
| Second Advertisement Date        | 08/18/2020                           |
| Response Deadline From Objectors | 08/25/2020 at 3:00 p.m. Central Time |
| Notice of Award/No Award Posted  | Not before 08/26/2020                |

### Project Details

ITS issued RFP Number 2663 on behalf of MDRS in 1995, and the awarded vendor was Versa Management Systems, Inc. In April 1995, MDRS purchased CaseExpert software licenses, conversion services, application modifications, training, and six months of maintenance. In October 1996, MDRS purchased enhancements and one year of maintenance from Versa Management Systems, Inc. MDRS renewed the contract with Versa Management Systems, Inc. for an additional year of maintenance and enhancement services annually from October 1997 through October 2001. In October 2002, the contract between MDRS and Versa Management Services, Inc. was renewed for five years. MDRS purchased an additional five years of maintenance and enhancement services from Versa Management Services, Inc. in October 2007. Iron Data, Inc. acquired Versa Management Systems, Inc. in January 2010. MDRS purchased an additional five years of maintenance and enhancement services from Iron Data, Inc. in October 2012. MicroPact Global, Inc. merged with Iron Data, Inc. in August 2015.

In September 2017, ITS issued Notice of Intent to Certify Sole Source Number 4035. No objections were received, and MicroPact Global, Inc. was certified to be the sole source provider of CaseExpert maintenance and enhancement services. MDRS purchased an additional three years of maintenance

and enhancement services from MicroPact Global, Inc. in October 2017. The current contract expires on September 30, 2020.

MDRS has received a total of \$4,169,152.30 in spending authority and wishes to purchase an additional one year of CaseExpert enhancement services and extend the CaseExpert annual maintenance through September 30, 2021, in an amount not to exceed \$327,800.00.

### **Submission Instructions and Format of Response from Objecting Parties**

Interested parties who have reason to believe that the CaseExpert maintenance, support, and enhancements should not be certified as a sole source should provide information in the following format for the State to use in determining whether or not to proceed with awarding the Sole Source contract to MicroPact Global, Inc.

1.1 Interested Party Information

1.1.1 Contact Name, Phone Number and email address

1.1.2 Company Website URL, if applicable

1.2 Objection to Sole Source Certification

1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.

1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.

1.3 Comments will be accepted at any time prior to Tuesday, August 25, 2020, at 3:00 p.m. (Central Time) to Justin Faucette at [Justin.Faucette@its.ms.gov](mailto:Justin.Faucette@its.ms.gov) or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, email or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES. It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Justin Faucette to verify the receipt of their Responses. Responses received after the deadline will be rejected.

1.4 Interested Party responses should include the following information:

|   |
|---|
| <p style="text-align: center;"><b>SUBMITTED IN RESPONSE TO</b><br/><b>Sole Source Certification No. 4328-45793</b><br/><b>Accepted until August 25, 2020 @ 3:00 p.m.,</b><br/><b>ATTENTION: Justin Faucette</b></p> |
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If you have any questions concerning the information above or if we can be of further assistance, please contact Justin Faucette at 601-432-8165 or via email at [Justin.Faucette@its.ms.gov](mailto:Justin.Faucette@its.ms.gov).

Attachment A: Customer Sole Source Certification Request

Attachment B: Vendor Correspondence  
Attachment C: Sole Source Procurement Overview



## Sole Source Certification Request

|  |                      |  |   |
|--|----------------------|--|---|
| <b>Project Title: Renewal of Micropact Contract</b>  |                      | <b>Stimulus (ARRA) Funds? Yes No <u>X</u></b>  |   |
| <b>Customer Contact Information</b>  |                      |  |   |
| Agency/Public University: Department of Rehabilitation Services<br>Address: 1281 Hwy. 51 North<br>Madison, MS 39110  |                      | Contact Person: Paula Brown, MIS Director<br>Phone: 601-835-5241<br>Email Address: PBrown@mhrs.ms.gov                      |   |
| MAGIC Customer Number (only required from state agencies): 7000000187<br>(MDRS-Disability Determination Svces)   |                      | Division/Dept.: IT<br>Handmail: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No                        |   |
| <b>Project Summary Narrative Description of Project</b> (include details of original acquisition if applicable): This system is the legacy system used in conjunction with several other systems to process Social Security Disability Claims. Since 1995, MDRS has had a support, maintenance, and enhancement agreement with the software vendor. The company has been bought out three times since 1995, and the current vendor is MicroPact Global, Inc. Contracts have been amended every five years to reflect the new pricing. The most recent contract was done for three years. This time, due to the phasing out of the legacy system, the contract will be for one year. It is again time to amend the contract to reflect the new pricing structure.   |                      |  |   |
| <b>ITS Acquisition Approval (CP-1) should be effective through this date</b> (Please allow time for all vendor invoices to be paid):   |                      |  |   |
| <b>Cost Estimates Fiscal Year</b>  | <b>Initial Costs</b> | <b>Ongoing Costs</b>   | <b>Time Constraints</b><br>Item Needed by: 10/01/2020   |
| FY21   | \$307,800.00         | \$20,000.00  | <b>Anticipated Lifecycle of Products/System</b> (i.e. estimated years of effective use): 1 year |
| <b>Total</b>   |                      | \$327,800.00   |   |
| <b>Discuss Funding</b> (e.g. how much of needed funding is definite; total project budget; any matching or other non-state funds). This project is 100 percent federally funded by the Social Security Administration. At this point, funding is definite.   |                      |  |   |
| <b>Acquisition Details</b>   |                      |  |   |
| <b>Items Requested</b>   | <b>Quantity</b>      | <b>Description</b>   | <b>Building Location(s)</b>   |
| Software Maintenance and Support   |                      | CaseExpert maintenance and support for 1 year  |   |
| <b>Describe platform &amp; infrastructure</b> (connectivity; software/hardware platforms; utilization of State Data Center resources: mainframe, eGovernment portal, payment engine, document management, hosting). For equipment or hosting outside the State Data Center, attach justification: This software will be on the DDS network that is attached to the SSA network. It will not touch the State's network.   |                      |  |   |
| <b>Progress to Date:</b> What has been done related to this project, including any communication with ITS staff (data/voice/procurement/other)? We have received a quote from the vendor.  |                      |  |   |
| <b>Sole Source Certification</b> Note: Certification must be renewed for each revision or continuation of previous Sole Source Approvals.  |                      |  |   |
| <b>Specific business requirements to be met by the requested products or services:</b> CaseExpert has been in production in the Disability Determination Services (DDS) since 1995. DDS relies heavily on this system, which provides automation of the disability case processing process, to meet processing goals established by SSA. MicroPact Global, Inc. is responsible for federally mandated changes to CaseExpert. The purpose of the DDS is to provide support to SSA in the processing of disability claims. CaseExpert is the means by which DDS can provide this support. CaseExpert also assists with scheduling of appointments, producing correspondence for claimants and the attending physician, and making payments; this functionality is not available in ordinary scheduling programs. MDRS has made the business decision to continue using the CaseExpert software product by MicroPact Global, Inc.   |                      |  |   |
| <b>Explain why these products or services are the only ones that can meet your needs</b> (include unique features/special functionality): CaseExpert is the case management system used by the Disability Determination Services (DDS) of MDRS to process approximately 77,000 disability claims per year. CaseExpert is a disability case processing system used to process disability claims following the Social Security Administration's (SSA) Program Operations Manual. The MicroPact solution is critical in supporting and enhancing the efficiencies of the disability case processing systems, interfaces, and processes in support of SSA's Electronic Folder. These enhancements allow for the receipt and processing of additional data elements from the Electronic Folder and changes to the interface. The enhancement services are used to address small functionality changes needed in the software that are unique to Mississippi legal requirements. |                      |  |   |
| <b>Explain why the source is the only entity that can provide the products or services</b> (Include other products/vendors researched or evaluated): CaseExpert is a proprietary product available only from MicroPact Global, Inc. No other organization or individual has the right to sell, license, modify, or support the system.   |                      |  |   |
| <b>Vendor's Certification of Sole Source attached:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No   |                      | <b>Vendor's proposal submitted:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No                    |   |
| <b>MAGIC Vendor Code(s)</b> Vendor must be in MAGIC before a CP-1 can be issued.   |                      |  |   |
| <b>Place Order To</b><br>Vendor Name: MicroPact Global, Inc.<br>Vendor Address: 3400 Players Club Row Ste 100, Memphis, TN 38125   |                      | <b>Remit To</b><br>Vendor Name: MicroPact Global, Inc.<br>Vendor Address: 3400 Players Club Row Ste 100, Memphis, TN 38125 |   |

By my signature, I certify that, to the best of my professional knowledge: the requested product or services are a sole source as outlined in the ITS Procurement Handbook, Rule 207.2:013-030 Procurement Types: Sole Source, and as outlined in Mississippi Code annotated Section 3-7-13. In addition, I acknowledge that there is a charge for ITS procurement services associated with this request which will be billed to the requestor by ITS and that my agency/public university is responsible for these charges/costs.

Chris Howard, Executive Director  
 Name (Agency Head or Public University CIO)/Title

Signature

5/6/2008  
 Date



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St. Louis, MO 63141

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[tylertech.com](http://tylertech.com)

February 13, 2020

Ms. Paula Brown  
State of Mississippi  
Disability Determination System  
1281 Highway 51 North  
Madison MS, 39110

Ms. Brown

CaseExpert is a proprietary product available only from MicroPact Global, Inc. No other organization or individual has the right to sell, license, modify or support this system. CaseExpert is approved/sanctioned by the Social Security Administration for use in disability Determination Services and is currently being utilized by 17 states across the country.

We believe CaseExpert is unique in the marketplace because of its overall combination of features, architecture and depth of support. This combination is critical to meet the needs of the Mississippi Disability Determination Services and includes:

- Comprehensive functionality which controls every facet of your disability entitlement program and that is specifically designed to meet the unique needs of the Mississippi Disability Determination Services;
- An integrated database totally meeting the regulations of the Social Security Administration using SSA approved technology;
- Powerful functionality and flexibility to accommodate the distinctive and changing requirements of the Mississippi Disability Determination Services;
- The capability to handle increasing caseloads while maintaining a high-quality, comprehensive examination of each claim;
- A pricing structure that provides an effective way to accommodate both growth and change; and
- The backing and support of MicroPact, with its many years of experience in the disability determination field. There is no one, except MicroPact, that has the capability to maintain and support the CaseExpert System.

We hope this information is satisfactory. If you require anything further, please do not hesitate to contact us.

We appreciate the opportunity to provide our products and services.

Very truly yours,

MICROPACT GLOBAL, INC.

A handwritten signature in blue ink that reads "Karen M. Edelen".

Karen Edelen, State Contracts Manager

KME/jrm

Enclosures

## Attachment C

The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website ([www.its.ms.gov](http://www.its.ms.gov)).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment B.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$50,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source documentation must be reviewed and approved by the IHL's CIO for any sole-source certification

above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS. The customer's Sole Source Certification Request for this project is included as Attachment A.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.