Mississippi Department of
Information Technology Services

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Craig P. Orgeron, CPM, Ph.D., Executive Director

Notice of Intent to Certify Sole Source

To: Interested Parties

From: Craig P. Orgeron, CPM, Ph.D. *CPO*

CC: ITS Project Number 49144

Date: August 26, 2025

Re: Sole Source Certification Number 4711 to provide Vocational Rehabilitation Ticket to Work/Reimbursement Tracker Software Subscription for the Mississippi Department of Rehabilitation

Contact Name: Denetta Durr

Contact Phone Number: 601-432-8022

Contact E-mail Address: denetta.durr@its.ms.gov

Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 4711 for the Mississippi Department of Rehabilitation Services (MDRS), please be advised that ITS intends to award Morrow Consulting, LLC, as the sole source provider of Vocational Rehabilitation Ticket to Work/Reimbursement Tracker Software Subscription through September 30, 2028, in an amount not to exceed $34,000.00. Please be advised that ITS will determine if additional licenses, enhancements, and upgrades are within scope during the certification period and may increase the spending authority accordingly. Should Morrow Consulting, LLC 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 B: 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:

    While other CRM or case management systems can be customized, Ticket Tracker is specifically designed for *Employment Networks* and *Vocational Rehabilitation* agencies operating under SSA's Ticket to Work program. Key differentiators include SSA-specific compliance built-in forms and reports, integrated reimbursement tracking, secure SSA data exchange, and performance/outcome reporting, and proven industry use. Additionally, the Tracker software program has improved the way reimbursements are processed by combining information from the state's Vocational Rehabilitation (VR) case management system, the Unemployment Insurance (UI) records, and the state Verification and Exchange

(SVES) Social Security data to automate the processing and tracking of these payments. The system searches all the records to determine which cases have the correct Social Security type and have met the earnings requirements for reimbursement. Using the VR information, the system can calculate the amount of time and direct services that had been provided for that case. This information is then used by the system to create all the necessary documentation to submit reimbursement claims.

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

   The Tracker software program is a system for tracking and processing traditional reimbursements for services provided to beneficiaries and *Ticket to Work* (both outcome and milestone) payments. Such services include job coaching, training, skill development, and other support services directly tied to maintaining employment. The *Ticket to Work* program is a Social Security Administration (SSA) initiative that supports individuals with disabilities in returning to work without immediately losing benefits. The system connects data from Mississippi Vocational Rehabilitation Services' (MVRS) case management system and uses this information to determine when cases have met the requirements for Ticket or Reimbursement payments. Ticket and reimbursement processing are integrated so that a case is only processed under its appropriate payment system. The Tracker's reimbursement module tracks each participant's progress and automatically applies SSA's milestone/outcome payment schedule, and then it generates claims in the correct SSA format. This reduces manual calculation errors and audit risks. The system also tracks cases that have been submitted to determine whether subsequent claims can be made for post-employment services.

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:

   Morrow Consulting is the only company that offers this service. The Tracker software is only available through Morrow Consulting, LLC and cannot be purchased from any other vendors. Morrow Consulting, LLC has certified that they are the sole source provider of the Tracker software. The Vendor's sole source certification letter is included as Attachment A.

Schedule

Task	Date
First Advertisement Date	08/26/2025
Second Advertisement Date	09/02/2025
Response Deadline From Objectors	09/10/2025 at 3:00 P.M. Central Time
Notice of Award/No Award Posted	Not before 09/11/2025

Project Details

The Tracker software was originally purchased by MDRS in 2012 for $5,000.00, with an additional $5,000.00 per year for software licensing and subscription. In 2017, ITS began issuing Notice of Intents to Certify Sole Source for the Tracker software subscription and has not received any objections. The current Certification and MDRS' subscription expires September 30, 2025. With this extension, the 15-year lifecycle cost of the project to date is estimated to be $139,000.00.

Submission Instructions and Format of Response from Objecting Parties

Interested parties who have reason to believe that the Vocational Rehabilitation Ticket to Work/Reimbursement Tracker Software Subscription 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 Morrow Consulting, LLC.

    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 Wednesday, September 10, 2025, at 3:00 p.m. (Central Time) to Denetta Durr at denetta.durr@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, e-mail 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 Denetta Durr 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:

> **SUBMITTED IN RESPONSE TO**
> **Sole Source Certification No. 4711**
> **Accepted until September 10, 2025 @ 3:00 p.m.,**
> **ATTENTION: Denetta Durr**

If you have any questions concerning the information above or if we can be of further assistance, please contact Denetta Durr at 601-432-8022 or via email at denetta.durr@its.ms.gov.

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

MORROW CONSULTING, LLC

10658 N. Oak St.
Hayden, ID 83835
(208) 651-2413
www.morrowconsulting.com

Tracker Sole Source Confirmation

Melvin Robinson
MS Dept of Rehabilitation Services
P O Box 1698
Jackson, MS 39215

July 14, 2025

Dear Mr. Robinson:

The Morrow Consulting, LLC Vocational Rehabilitation Ticket to Work/Reimbursement Tracker program (Tracker for short) is the only system currently available that can perform all the following Traditional Reimbursement and Ticket to Work related tasks:

- Import data from the VR agency's case management system (CMS)
- Import data from state Unemployment Insurance Wage records
- Import Social Security data from the State Verification and Exchange System (SVES)
- Import Social Security Vocational Rehabilitation Client Earnings Report (VRCER)
- Import State Wage Interchange System (SWIS) data files
- Use the above data to pick out potential Reimbursement claims and Ticket payments
- Generate electronic files and forms for Ticket assignment and Reimbursement requests
- Import and reconcile Payment Status Reports
- Track responses to payment requests
- Generate reports to track submissions and payments over time
- Generate Ticket In-Use files and import Ticket In-Use response files

The system is able to perform other related tasks, but these are the main ones. For more information about the Tracker please visit, http://www.vocrehabtracker.com.

The Tracker software is only available through Morrow Consulting, LLC and cannot be purchased from any other vendors. Morrow Consulting, LLC is a single operation. You would be dealing directly with Morrow Consulting, LLC and no subcontractors on all aspects of system installation, maintenance, updates, training, support, etc.

Sincerely,

Feliciano J Morrow
President

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).

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 A.

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 $75,000 (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.

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.