

**24-75743 BUSINESS PROPOSAL
ATTACHMENT E**

Instructions: Please provide answers in the shaded areas to all questions. Reference all attachments in the shaded area.

Business Proposal

- 2.3.1 General (optional)** - Please introduce or summarize any information the Respondent deems relevant or important to the State's successful acquisition of the products and/or services requested in this RFP.

From the initial review of this RFP, we have increased excitement across the organization to deliver a COTS, award-winning solution to the State of Indiana as we meet and exceed the minimum set of requirements and scope items. We are equally excited about our selection of MBE, WBE, and IVBE businesses located in Indiana to complete subcontractor duties and grow our partner network. Thank You for your review of our proposal, and we look forward to hearing feedback and an invite for oral presentations/demos as-relevant.

- 2.3.2 Respondent's Company Structure** - Please include in this section the legal form of the Respondent's business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization. If the organization includes more than one (1) product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization. Please enter your response below and indicate if any attachments are included.

Note - Links that are made public are contained within all response sections, additionally a folder within the Flash Drive titled (Link Reference Attachments) will contain hard PDF copies/attachments.

TrackMy® Solutions Inc. is a Missouri C Corporation, and are in good standing per this certificate of authority - [Link here](#) and in Appendix Folder on Flash Drive, document titled - Articles of Incorporation Certificate.

The TrackMy business is focused on delivering award-winning technology to state and local government, healthcare, education and employer markets. Our commercially, off-the-shelf functionality includes automated immunization retrieval and tracking, compliance reporting, customized medical questionnaires, online scheduling, OSHA symptom and exposure tracking, real-time surveillance, reminders for overdue or missing items, respirator fit testing, digital waivers, consents and more.

Chart of the TrackMy Organization - [Link here](#) and in Appendix Folder on Flash Drive,

document titled - TrackMy Leadership & Team

TrackMy does not currently include more than one product division, rather we service all markets/clients through a centrally organized entity.

2.3.3 Respondent's Diversity, Equity and Inclusion Information - With the Cabinet appointment of a Chief Equity, Inclusion and Opportunity Officer, on February 1, 2021, the State of Indiana sought to highlight the importance of this issue to the state. Please share leadership plans or efforts to measure and prioritize diversity, equity, and inclusion. Also, what is the demographic compositions of Respondents' Executive Staff and Board Members, if applicable.

TrackMy® Solutions is committed to fostering, cultivating, and preserving a culture of diversity, equity and inclusion.

Our human capital is the most valuable asset we have. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities, and talent that our associates invest in their work represents a significant part of not only our culture but our reputation and company's achievement as well.

We embrace and encourage our employees' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique.

TrackMy® Solutions' diversity initiatives are applicable—but not limited—to our practices and policies on recruitment and selection; compensation and benefits; professional development and training; promotions; transfers; social and recreational programs; layoffs; terminations; and the ongoing development of a work environment built on the premise of gender and diversity equity that encourages and enforces:

- Respectful communication and cooperation between all employees.
- Teamwork and employee participation, permitting the representation of all groups and employee perspectives.
- Work/life balance through flexible work schedules to accommodate employees' varying needs.
- Employer and employee contributions to the communities we serve to promote a greater understanding and respect for diversity.

Our team members further their education annually and take a 2 hour course with a

quiz called "Dignity and Respect in the Workforce".

Our team is comprised of 40% women and 48% minorities.

2.3.4 Company Financial Information - This section must include documents to demonstrate the Respondent's financial stability. Examples of acceptable documents include most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why, and include an income statement and balance sheet, for each of the two most recently completed fiscal years.

If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information **should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.**

TrackMy is a Dunn & Bradstreet member; DUNS - 08-068-2523 - *Note - we do not maintain/update regularly (outside of having business fraud monitoring/surveillance) our DUNS profile, as our core clients do not request this type of information.*

Due to irregular updates of our DUNS information, we are attaching our most recent two years of Income Statements and Balance Sheets to show financial stability:

Income Statement 2021 - [Here](#) , and in Appendix Folder on Flash Drive, document titled - 2021 Income Statement TrackMy Indiana

Income Statement 2022 - [Here](#), and in Appendix Folder on Flash Drive, document titled - 2022 Monthly Income Statement TrackMy Indiana

Balance Sheet 2021 - [Here](#), and in Appendix Folder on Flash Drive, document titled - 2021 Balance Sheet TrackMy Indiana

Balance Sheet 2022 - [Here](#), and in Appendix Folder on Flash Drive, document titled - 2022 Balance Sheet TrackMy Indiana

2.3.5 Integrity of Company Structure and Financial Reporting - This section must include a statement indicating that the CEO and/or CFO, of the responding entity/organization, has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The areas of interest to the State in considering corporate responsibility include the

following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

I, Jeremy Elias, take personal responsibility of the thoroughness and correctness of any/all financial information supplied with this proposal.

Signed, Jeremy Elias

2.3.6 Contract Terms/Clauses - Please provide the requested information in RFP Section 2.3.6.

TrackMy has reviewed the sample contract, and accepts the mandatory and substantively clauses of the contract. TrackMy requests no exceptions to this section, nor requests special/additional contracting terms based on the current scope of work outlined.

2.3.7 References - Reference information is captured on **Attachment H** Respondent should complete the reference information portion of the **Attachment H** which includes the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information if the State elects to do so. The rest of **Attachment H** should be completed by the reference and emailed DIRECTLY to the State. The State should receive three (3) **Attachment Hs** from clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. At least one (1) reference should be for a client for whom you have implemented your proposed solution and is currently actively utilizing your solution. **Attachment H** should be submitted to idoareferences@idoa.in.gov. **Attachment H** should be submitted no more than ten (10) business days after the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

Customer 1	
Legal Name of Company or Governmental Entity	County of Bucks (Pennsylvania)
Company Mailing Address	911 Freedom Way
Company City, State, Zip	Ivyland, PA 18974
Company Website Address	buckscounty.org
Contact Person	Audrey Kenny
Contact Title	Director of Emergency Services
Company Telephone Number	215-340-8771
Company Fax Number	N/A
Contact E-mail	arkenny@buckscounty.org

Industry of Company	State and Local Government
Customer 2	
Legal Name of Company or Governmental Entity	Medical Center of Marin
Company Mailing Address	101 Casa Buena Dr.
Company City, State, Zip	Corte Madera, CA 94925
Company Website Address	https://www.mcomarin.com/
Contact Person	Dr. Brett Curtis
Contact Title	Medical Director and Owner
Company Telephone Number	415.925.4525
Company Fax Number	N/A
Contact E-mail	BVCurtis@mcomarin.com
Industry of Company	Medical Services, Urgent Care, State and Local Government
Customer 3	
Legal Name of Company or Governmental Entity	Healthcare IT Leaders
Company Mailing Address	925 North Point Pkwy Suite 425
Company City, State, Zip	Alpharetta, GA 30005
Company Website Address	https://www.healthcareitleaders.com/
Contact Person	Andrew Lux
Contact Title	Executive Director, Managed Services
Company Telephone Number	(317) 512-0996
Company Fax Number	N/A
Contact E-mail	andrew.lux@healthcareitleaders.com
Industry of Company	Healthcare Technology, Hospital/Health System

2.3.8 Registration to do Business – Per RFP 2.3.8, Respondents providing the products and/or services required by this RFP must be registered to do business by the Indiana Secretary of State. The Secretary of State contact information may be found in Section 1.18 of the RFP. This process must be concluded prior to contract negotiations with the State. It is the successful Respondent's responsibility to complete the required registration with the Secretary of State. Please indicate the status of registration, if applicable. Please clearly state if you are registered and if not provide an explanation.

TrackMy is in the process of becoming a registered business in the State of Indiana, and will have this process completed prior to contract negotiations as indicated with the State.

2.3.8 Authorizing Document - Respondent personnel signing the Executive Summary of the proposal must be legally authorized by the organization to commit the

organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement. Please enter your response below and indicate if any attachments are included.

Jeremy Elias, President and CEO is authorized by the organization to commit to client and partner contracts, [link here](#) (and in *Appendix Folder on Flash Drive, document titled - TrackMy Board Resolution - contracts*) to document for the corporate resolution confirming this.

- 2.3.9 **Subcontractors** - The Respondent is responsible for the performance of any obligations that may result from this RFP and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Per instructions in **Attachment J**, either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered by the Respondent must be in compliance with all State statutes and will be subject to the provisions thereof. For each portion of the proposed products and services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor's related qualifications and experience.

The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in the State's evaluation. The Respondent must furnish information to the State as to the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by the State. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of the State.

The Respondent must list any subcontractor's name, address, and the state in which formed that are proposed to be used in providing the required products and/or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, subcontractor's form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority Business Enterprise, Women's Business Enterprise, or Veteran Owned Business under IC

4-13-16.5-1 and IC 5-22-14-3.5. See Sections 1.21, 1.22 and **Attachments A/A1** for Minority, Women, and Veteran Business information.

IVOSB entities (whether a prime or subcontractor) must have a Bidder ID. If registered with IDOA, this should have already been provided (as with MWBEs). IVOSBs that are only registered with the Federal Center for Veterans Business Enterprise will need to ensure that they also have a Bidder ID provided by IDOA (please see section 2.3.7 for details).

Our subcontractors include all Indiana certified businesses (with their value-added areas included), PMPHASE (MWBE-certified, project management), Vergence Group (MBE-certified, Database Admin; Database Migration, IT Testing), aFit (WBE-certified, project management, IT training), and Corvano (IVBE-certified, Integration Lead).

Additional details requested:

-Brown Design and Workflow Creations, LLC., d/b/a/ PMPHASE (PM PHASE), 9640 Commerce Drive Carmel, IN 46032, MWBE certified in Indiana (claiming WBE certified for this RFP); PM Phase will complete project management duties, anticipated dollar amount - \$266,840, for 6.7% of the total project cost for year 1

-aFit Staffing, Inc., 8925 N. Meridian St., Suite 101 Indianapolis, IN 46260; WBE certified in Indiana, aFit will complete OCM Lead, Project Management, and Training Lead services, anticipated dollar amount - \$326,690, for a 8.2% of the total project cost for year 1.

-Vergence LLC, 5670 Caito Drive, Suite 130, Indianapolis, IN 46226; MBE certified in Indiana, Vergence will complete Database Administrator, Data Migration Lead, and Testing lead services, anticipated dollar amount - \$416,718, for a 10.5% total project cost for Year 1

-Corvano LLC 11309 GUY STREET, SUITE 220 FISHERS, IN 46038; IVOSE/IVBE certified in Indiana, Corvano will complete integration lead duties and interface work, anticipated dollar amount - \$247,780, for a 6.25% of the total project cost for Year 1

Letters of Commitments, certification letters, and subcontractor forms are added as links here, and will be included as attachments in the flash drive folder and as part of this business proposal template -

-[Brown Design and Workflow Creations, LLC., d/b/a/ PMPHASE](#) (and in Appendix Folder on Flash Drive, document titled - PM Phase MWBE Subcontractor Commitment Form (Attachment A), Letter of Commitment and Certification Letter)

-[aFit Staffing](#) (and in Appendix Folder on Flash Drive, document titled - aFit Staffing WBE Subcontractor Commitment Form (Attachment A), Letter of Commitment and Certification Letter)

-[Vergence](#) (and in Appendix Folder on Flash Drive, document titled - Vergence Group MBE Subcontractor Commitment Form (Attachment A), Letter of Commitment and Certification Letter)

-[Corvano](#) (and in Appendix Folder on Flash Drive, document titled - Corvano IVOSB Subcontractor Commitment Form (Attachment A1), Letter of Commitment and

Certification Letter)

2.3.10 Evidence of Financial Responsibility – Removed at the request of the agency.

2.3.11 General Information - Each Respondent must enter your company's general information including contact information.

Business Information	
Legal Name of Company	TrackMy Solutions Inc.
Contact Name	Jeremy Elias
Contact Title	Founder and CEO
Contact E-mail Address	jeremy.elias@trackmysolutions.us
Company Mailing Address	8700 Monrovia Street Suite 310
Company City, State, Zip	Lenexa, KS 66215
Company Telephone Number	816-536-4088
Company Fax Number	N/A
Company Website Address	https://trackmysolutions.us/
Federal Tax Identification Number (FTIN)	84-4123767
Number of Employees (company)	16
Years of Experience	4
Number of U.S. Offices	1
Year Indiana Office Established (if applicable)	In process
Parent Company (if applicable)	N/A
Revenues (\$MM, previous year)	\$3M
Revenues (\$MM, 2 years prior)	\$8.7M
% Of Revenue from Indiana customers	0

- a. Does your Company have a formal disaster recovery plan? Please provide a yes/no response. If no, please provide an explanation of any alternative solution your company has to offer. If yes, please note and include as an attachment.

Yes

- b. What is your company's technology and process for securing any State information that is maintained within your company?

TrackMy is SOC2, Type 2 compliant, and we take information security very seriously. All data is housed within our secure AWS instance, and we encrypt data in-transit and at rest.

2.3.12 Experience Serving State Governments - Please provide a brief description of your company's experience in serving state governments and/or quasi-governmental accounts.

County of Bucks project (reference), Pennsylvania Emergency Management Association, Chester County Vaccination Administration, LAUSD School District COVID Testing administration

2.3.13 Experience Serving Similar Clients - Please describe your company's experience in serving customers of a similar size to the State with similar scope. Please provide specific clients and detailed examples.

Below are a list of organizations in which TrackMy has delivered system solutions and services similar in size and scope:

- **Client Name** - County of Bucks, Pennsylvania (State and Local Government - Health Dept.)
- **Project Description and Goals** - COVID-19 Vaccination Support Services was the organizations project description Goals were to vaccinate over 190k individuals across the fourth largest county in the state of Pennsylvania
- **Solutions Used:** TrackMy Verivax was the solution proposed, same as the one being proposed for VISIT
- **The Functionality Included:** TrackMy provided the registration, scheduling, vaccination administration technology system, complete with required regulatory reporting to the state IIS, insurance billing/claims, inventory tracking and call center work. The solution was implemented in February 2021, and used successfully through April 2022.
- **Who Hosted the Solution:** TrackMy's software is securely cloud hosted by Amazon Web Services.
- **Your Project Role:** Implementation of software, delivery of software, end user support for software, project management of software, call center support, for software advisory services for mass vaccination events.
- **Duration of the role:** The solution was implemented in February 2021, and used successfully through April 2022
- **Whether the solution has been implemented:** Yes the solution and services was successfully implemented and used February 2021, and used successfully through April 2022
- **Project Results:** TrackMy and the organization were able to register, schedule, and care for over 195,000 residents in the county at our 5 clinic sites.
- **Describe any problems and failures that you encountered in delivering your services, how these were resolved, and what were the lessons learned:**
Given the state of emergency, state and local government continue to change who was eligible to receive the series of COVID 19 vaccines. This force TrackMy to continue to scale and deliver timely code changes for eligibility criteria (i.e. age). To remedy, TrackMy closely worked with state and local officials to determine ongoing changes

and impacts to which TrackMy proactive provided code changes on weekly basis.

- Client Name: Advocate Health (National Health System)

- Project Description and Goals: Streamline and offer improved experience for flu and covid vaccinations. Goals included vaccinating and tracking over 120k individuals vaccinated across 5 states, 28 locations, 3 time zones while staying on-budget and on-time.

- Solutions Used: TrackMy Verivax was the solution proposed, same as the one being proposed for VISIT

- The Functionality Included: TrackMy provided the web access, mobile friendly access, registration, online scheduling, vaccination administration technology system, complete with required regulatory reporting to the state IIS, inventory tracking, end user support and call center work. The solution was implemented in August 2022, currently being used, and contracted to be used until 2027

- Who Hosted the Solution: TrackMy's software is securely cloud hosted by Amazon Web Services.

- Your Project Role: Implementation of software, delivery of software, end user support for software, project management of software, call center support for software, advisory services CMS and NHSN reporting compliance.

- Duration of the role: The solution was implemented in August 2022, currently being used, and contracted to be used until 2027

- Whether the solution has been implemented: Yes the solution was implemented in August 2022, currently being used, and contracted to be used until 2027

- Project Results: TrackMy and the organization were able to achieve a 8:1 Return on Investment via FTE minimization, lab draws, and regulatory compliance. Removed Manual Vaccine Documentation Process. Increased Number of Flu Vaccines. Easier ability to generate daily reporting at micro and macro Level. Delivered on-Time & on-Budget flu and covid event for 2022.

- Describe any problems and failures that you encountered in delivering your services, how these were resolved, and what were the lessons learned: None to this date.

- Client Name: MCO Marin (Regional Medical Center That Serves State and Local Government Entities)

- Project Description and Goals: Eliminate manual process for registration, scheduling, provider vaccine documentation and reporting vaccines to state immunization registry. Goals were to provide a streamlined solution for patients to register to receive flu and tb skin tests in the most consumer-friendly manner. Additionally delivered to provider administering vaccines and tb tests, the easiest and quickest workflow to ensure large volumes of patients could be handled.

- Solutions Used: TrackMy Verivax was the solution proposed, same as the one being proposed for VISIT

- The Functionality Included: TrackMy provided the web access, mobile friendly access, registration, online scheduling, vaccination administration technology system, TB test tracking, complete with required regulatory reporting to the state IIS, inventory tracking, end user support and call center work. The solution was implemented in July 2022, currently being used, and contracted to be used until 2027
- Who Hosted the Solution: TrackMy's software is securely cloud hosted by Amazon Web Services.
- Your Project Role: Implementation of software, delivery of software, end user support for software, project management of software, call center support for software, advisory services for public health reporting.
- Duration of the role: The solution was implemented in August 2022, currently being used, and contracted to be used until 2027
- Whether the solution has been implemented: Yes the solution was implemented in August 2022, currently being used, and contracted to be used until 2027
- Project Results: TrackMy delivered a state of the art solution for the organization. As a result they were able to deliver multiple public health vaccine and tb testing events throughout their respective county.

- Describe any problems and failures that you encountered in delivering your services, how these were resolved, and what were the lessons learned: None to this date.

- **Client Name:** Healthcare IT Leaders (Consulting Firm for State and Local Government Entities, a Healthcare provider)

- Project Description and Goals: TrackMy is/has providing vaccine verification and compliance tracking, test result administration and tracking, Robust Regulatory Reporting, Online Scheduling for Vaccine and testing (Flu, Covid, etc), Provider Vaccine Administration Documentation, Provider test result administration documentation, State test/Vaccine Administration Reporting & Inventory Mgmt., lab test integration, test label printing, Digital Waiver/Consent Forms, Surveillance tracking. The solution was implemented in January 2021, and is continuing to be used successfully to date, with TrackMy delivering additional functionality per our request ongoing.

- Solutions Used: TrackMy Verivax was the solution proposed, same as the one being proposed for VISIT

- The Functionality Included: TrackMy provided the web access, mobile friendly access, registration, online scheduling, vaccination administration technology system, TB test tracking, complete with required regulatory reporting to the state IIS, inventory tracking, end user support and call center work.

- Who Hosted the Solution: TrackMy's software is securely cloud hosted by Amazon Web Services.

- Your Project Role: Implementation of software, delivery of software, end user support for software, project management of software, call center support for software, advisory services for public health reporting.

- Duration of the role: The solution was implemented in January 2021 and currently being used.
- Whether the solution has been implemented: Yes the solution was successfully implemented in January 2021.
- Project Results: TrackMy was leveraged as the technology across several testing and vaccine verification clinics across higher education institutions. As a result, employee and students were able to return to facilities more quickly and safely during covid-19 pandemic.
- Describe any problems and failures that you encountered in delivering your services, how these were resolved, and what were the lessons learned: None to this date.

2.3.14 Indiana Preferences - Pursuant to IC 5-22-15-7, Respondent may claim only one (1) preference. For the purposes of this RFP, this limitation to claiming one (1) preference applies to Respondent's ability to claim eligibility for Buy Indiana points. **Respondent must clearly indicate which preference(s) they intend to claim. Additionally, the Respondent's Buy Indiana status must be finalized when the RFP response is submitted to the State.**

Approval will be system generated and sent to the point of contact email address provided within the Bidder Registration profile. This is to be attached as a screenshot (copied/pasted) for response evaluation.

Buy Indiana

Refer to Section 2.7 for additional information.

TrackMy cannot claim the Buy Indiana preference at this time, if awarded, we will seek out future projects across the State of Indiana in an effort to gain this preference.

2.3.15 Payment - Removed at the request of the agency.

2.3.16 Extending Pricing to Other Governmental Bodies - Removed at the request of the agency.