



State of Florida
Agency for Workforce Innovation

UC Modernization Project - Phase 2b

UC Modernization Project - Phase 2
(UCCBIS)

Preliminary Negotiations and Presentations Agenda -
Additional Instructions & Questions



DOCUMENT CONTROL

Revision History

Date	Author	Version	Change Reference
9/13/2010	Wayne Messina	1.00	Added prepared questions for Deloitte to the agenda.

Quality Review History

Name	Role	Date
Scott Rainey	QA SME	9/12/2010



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1 MEETING AGENDA & ADDITIONAL INSTRUCTIONS/QUESTIONS

1.1 DAY - 1

Ref#	Time	Agenda Item	Description	Additional Instructions/Questions
1	8:30AM-8:40AM	Meeting Kickoff	<ul style="list-style-type: none">• Instructions and administrative activities.	
2	8:40AM-9:30AM	Company and Team Experience	<ul style="list-style-type: none">• Introduce your team. Talk about their relevant experience and the contribution each team member will make to the project.	<ul style="list-style-type: none">• How many people are currently supporting your implemented System in Minnesota?• How many people are modeled to support the implemented system in Florida?• What is the geographic distribution of this staffing model (e.g., how many people staffed and where will they be located)?• Speak to the roles and responsibilities between Deloitte, CSG, ISOCORP, Brandt and ImageAPI staff?
3	9:30AM-9:45AM	Break		



4	9:45AM-10:45AM	Project Approach	<ul style="list-style-type: none">• Present your overall approach for delivering the project.• Address:<ul style="list-style-type: none">◆ Project Schedule (Phasing)◆ Requirements Validation◆ Development Approach◆ Data Conversion Approach◆ Testing Approach◆ Training and Knowledge Transition	<ul style="list-style-type: none">• Describe and discuss the data conversion tasks and who the responsible party is for completing each data conversion task.• How many of your associates will be on-site (by role and phase)?• Describe in detail the releases identified in your proposal and what is included in each release.• Schedule seems aggressive. What risks are identified in the current schedule? What mitigation strategies are proposed? What are the significant basis of estimates you used to derive the proposed effort and duration?• Your response indicated an aggressive schedule with tight controls regarding the ability to tailor your solution to meet our requirements. What assumptions are in your plan to tailor uFACTS to meet our requirements? Please discuss the ability to tailor uFACTS to meet our requirements in relationship to your proposed schedule. Please discuss the relationship to a change in schedule and a Firm Fixed Price (e.g., if a schedule is extended with no change in the scope and approved work, describe a response we should expect.) What process do you use to determine root
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				<p>cause analysis for schedule slippage?</p> <ul style="list-style-type: none">• What alternative Project Schedule/Phasing would you propose to reduce cost and risk?• Describe how legacy systems' data and process synchronization will occur during the three release rollout plan.• How will data integrity be enforced during the three release rollout?• Assuming no external or legislative constraints, describe the most cost effective approach and timeline to meet the project's requirements.• What do you see as the most predominant risks to meeting the project's objectives?• How much development will be completed on-site vs. off-site?• Does the inclusion of continued claims into the uFACTS Benefit Payment Control module (5.1.1.3) have any adverse effect on your proposed solution to break out continued claims into your phase 1 implementation (4.1.5.1) and the rest of BPC into your phase 2?
5	10:45AM-11:00AM	Break		



6	11:00AM-12:00PM	Solution Overview	<ul style="list-style-type: none">• Present the overall solution components focusing on the benefits the agency should expect to derive from the solution.• Discuss how your solution meets the project objectives and aligns with the service delivery model of the Unemployment Compensation Claims and Benefits program.• Present the process engineering approach you will follow as part of implementing the solution.	<ul style="list-style-type: none">• How does your ICON interface work?• How is the uFacts application licensed? Who maintains the software post-implementation?• Address the three functional requirements that you cannot deliver (FR.0525, FR.0616 and NF.0205).
7	12:00PM-1:00PM	Lunch		



8	1:00PM-2:30PM	Solution Architecture	<ul style="list-style-type: none">• Discuss the technical architecture of your proposed solution.• Focus on the integration of the components:<ul style="list-style-type: none">◆ Claimant Portal◆ Employer Portal◆ UC Claims & Benefits System◆ IVR◆ CRM◆ Imaging◆ Document Management	<ul style="list-style-type: none">• What is the backup strategy?• Describe your capacity planning methodology?• What variables and values were used to model your proposed hardware configuration?• Does your proposed hardware and software configuration include development, test, training, pre-production, and production environments?• Are the environments virtual or actual (e.g., partitions on the same unit or completely different units)?• What is the number of concurrent users you will use as the basis for performance testing (both internal users and external users)?• Describe how you plan to generate the test load. Are the tools and script development costs included in your proposal?
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				<ul style="list-style-type: none">• In Minnesota, what is the uptime percentage of the system?• In Minnesota System, what is the longest period of time the system was down due to maintenance?• In Minnesota, what is the longest period of time the system was down due to a system failure?• In Minnesota, how many database connections are in the connection pool?• In Minnesota, what is the maximum number of users that this system has been tested for?• In Minnesota, what is the average amount of time a user is on the system?
9	2:30PM-2:45PM	Break		



10	2:45PM-5:00PM	General System Functions -System Generated Correspondence, Advance Search, Document Management, Reporting	<p>Demonstrate the following system functionality:</p> <p>Generate System Correspondence:</p> <ul style="list-style-type: none">• Create Correspondence Templates• Generate Correspondence• Generate Mass Correspondence <p>Document Management</p> <ul style="list-style-type: none">• Demonstrate the document management capabilities of the system• Demonstrate how users can perform advanced searches for documents (e.g. full text, keyword, wild card, fuzzy logic)• Demonstrate the version control capabilities <p>Reporting:</p> <ul style="list-style-type: none">• Demonstrate how UC staff can access and execute reports• Demonstrate how UC staff can design, and execute ad-hoc reports• Demonstrate how graphics can be included in reports	<ul style="list-style-type: none">• Be prepared to describe and demonstrate current installations' "help" screens for claims, adjudication, appeals, BPC and give examples.
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11	5:00PM- 5:30PM	Question and Answer		
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1.2 DAY - 2

Ref#	Time	Agenda Item	Description	
1	8:30AM-9:30AM	General System Functions - Business Rules	Demonstrate the following system functionality: <ul style="list-style-type: none">• Business Rule Setup• Business Rule Maintenance - change, add, remove• Business Rule Execution	
2	9:30AM-9:45AM	Break		
3	9:45AM-10:45AM	General System Functions - Workflow	Demonstrate the following system functionality: <ul style="list-style-type: none">• Demonstrate the workflow capabilities of the system• Demonstrate how work moves from one user to another, and from one step to another within a business process• Demonstrate how workflow activities trigger notifications• Demonstrate how UC can create or edit workflows	



Ref#	Time	Agenda Item	Description	
4	10:45AM-11:45AM	General System Functions - Imaging & Security	Demonstrate the following system functionality: Imaging: <ul style="list-style-type: none">• How bar-coding will be used to identify documents• How images will be indexed• Image search capabilities Security: <ul style="list-style-type: none">• Setup User Roles• Setup Users• Maintain Users	<ul style="list-style-type: none">• What data is logged (Security, DB, UI, Middleware, etc.)?• How do you handle security of backend systems?(Operating System, Database, Middleware, Application Servers)
5	11:45AM-12:45PM	Lunch		



Ref#	Time	Agenda Item	Description	
6	12:45PM-2:00PM	Claimant Internet Portal	Demonstrate how the claimant will perform the following activities: <ul style="list-style-type: none">• Create an account and login to the portal• File an initial claim• Check the status of their claim• Receive request for information and other alerts from the UC Program• Respond to requests for information from UC• Submit requests for information to UC• Receive determinations on their claim• File an appeal of a determination• File a continuing claim (certify weeks)• Request an overpayment waiver• Make payment on an overpayment balance	
7	2:00PM-2:15PM	Break		



Ref#	Time	Agenda Item	Description	
8	2:15PM-2:45PM	Integrated Voice Response (IVR) Solution	Demonstrate how the claimant will use the IVR to file initial and continuing claims	
9	2:45PM-4:00PM	Customer Relationship Management (CRM) Solution	<p>Demonstrate how call center staff will use the CRM solution to:</p> <ul style="list-style-type: none">• Create a customer record in the CRM system• Update a customer record in the CRM system based on the results of a call• Capture all customer interaction, whether live answer, IVR, e-mail, postal mail or web-based. <p>In addition:</p> <ul style="list-style-type: none">• Demonstrate how the CRM system will be integrated with the telephony systems to support screen pops, transfer of customer context with the call, etc.• Demonstrate how the CRM system will integrate with the UC application for the transfer of customer information (bi-	



Ref#	Time	Agenda Item	Description
			directional) <ul style="list-style-type: none"> • Demonstrate how the CRM application will integrate with the e-mail management application • Demonstrate how the CRM application is used or fits into the agent desktop environment. • Demonstrate the reporting available out of the CRM system
10	4:00PM-5:00PM	Employer Portal	Demonstrate how employers will use the employer portal to: <ul style="list-style-type: none"> • Create an account and login • Review current and historical claims • Respond to requests for information from UC • Receive determinations • File an appeal • Request information from UC • Apply for Short Term Compensation (STC) assistance
11	5:00PM-5:30PM	Question and Answer	

Day-2 Meeting Adjournment at 5:30PM.



1.3 DAY - 3

Ref#	Time	Agenda Item	Description	
1	8:30AM-10:30AM	UC Program Workspace - Claims	<p>Demonstrate how UC staff will use the system to:</p> <ul style="list-style-type: none">• View their to-do/work lists• Enter an initial claim• Determine eligibility for Unemployment Benefits• Process combined wage claims (multi-state)• Approve an initial claim• Flag a claim for potential issues• Process claims for Emergency Unemployment Compensation• Set up business rules for and process Extended Benefits• Set up and process Disaster Unemployment Assistance (DUA)• Set up and process Short Term Compensation (STC)	<ul style="list-style-type: none">• Describe how your proposed solution addresses Wage Determination and any associated wage issues.• In section 5.1.1.1 of your proposal it states “Its components focus on efficient and accurate claimant registration, wage determinations, claimant self-service, and the establishment and maintenance of alternative programs. These services can be integrated with the tax processing functionality in SUNTAX, leveraging the interfaces that Deloitte helped develop as part of the SUNTAX Unemployment Tax deployment”. Describe in detail your proposed SUNTAX integration.



Ref#	Time	Agenda Item	Description	
2	10:30AM-10:45AM	Break		
3	10:45AM-12:00PM	UC Program Workspace - Adjudication	Demonstrate how UC staff will use the system to: <ul style="list-style-type: none"> • View their to-do/work lists • Communicate with claimants and employers • Process potential separation issues • Process potential non-separation issues • Determine employer chargeability 	<ul style="list-style-type: none"> • What percentage of non separation issues do you project to be automated? Do you have this methodology in production?
4	12:00PM-1:00PM	Lunch		
5	1:00PM-2:00PM	UC Program Workspace - Appeals	Demonstrate how UC staff will use the system to: <ul style="list-style-type: none"> • View their to-do/work lists • Create an Appeal • Schedule Appeal Events • Document Hearings • Document Appeal Decisions • Correct Determinations 	



Ref#	Time	Agenda Item	Description	
6	2:00PM-2:30PM	UC Program Workspace - Special Payments	Demonstrate how UC staff will use the system to: <ul style="list-style-type: none"> • View their to-do/work lists • Issue a payment • Certify Weeks • Issue Duplicate Affidavits 	<ul style="list-style-type: none"> • How are fund adjustments processed?
7	2:30PM-2:45PM	Break		
8	2:45PM-4:00PM	UC Program Workspace - Benefit Payment Control	Demonstrate how UC staff will use the system to: <ul style="list-style-type: none"> • View their to-do/work lists • Conduct a wage audit • Conduct a new hire audit • Set up an overpayment • Receive and reconcile payments • Create and remove an overpayment stop • Setup a waiver of an overpayment • Conduct Investigations 	<ul style="list-style-type: none"> • Be prepared to demonstrate /describe how an overpayment can be setup without a UC claim being established. • Describe how overpayments are managed through the 'fail to pay and disposition' process, i.e., courts, collection agencies. • Describe how an overpayment under multiple claims and multiple programs will be set up.



Ref#	Time	Agenda Item	Description	
9	4:00PM-5:00PM	Cost Discussion	This time will be set aside to discuss the cost components of the respondent's solution and services.	<ul style="list-style-type: none">• Provide detailed breakout of each operations and maintenance component by year.• Explain your support model through implementation (seems light).• Why are there no maintenance costs for software and hardware for the outlying years?• Provide detailed breakout of software and hardware costs.• Be prepared to discuss any and all options to eliminate, reduce, or defer costs.• Be prepared to discuss the cost of performing development activities on site in Tallahassee, Florida.



Ref#	Time	Agenda Item	Description	
10	5:00PM-5:30PM	Question and Answer		

Day-3 Meeting Adjournment at 5:30PM