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**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**



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## DOCUMENT CONTROL

### Revision History

Date	Author	Version	Change Reference
8/30/2010	Wayne Messina	1.00	Added prepared questions for IBM to the agenda.

### Quality Review History

Name	Role	Date
Scott Rainey	QA SME	8/30/2010



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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"><li>• Instructions and administrative activities.</li></ul>	
2	8:40AM-9:30AM	Company and Team Experience	<ul style="list-style-type: none"><li>• Introduce your team. Talk about their relevant experience and the contribution each team member will make to the project.</li></ul>	<ul style="list-style-type: none"><li>• What is your latest successful UC implementation (Core System) similar to Florida's requirements?</li><li>• How many people are currently supporting your implemented Core System?</li><li>• How many people are modeled to support the implemented system in Florida?</li><li>• What is the geographic distribution of this staffing model (e.g., how many people staffed and where will they be located)?</li></ul>
3	9:30AM-9:45AM	Break		



Ref#	Time	Agenda Item	Description	Additional Instructions/Questions
4	9:45AM-10:45AM	Project Approach	<ul style="list-style-type: none"><li>• Present your overall approach for delivering the project.</li><li>• Address:<ul style="list-style-type: none"><li>◆ Project Schedule (Phasing)</li><li>◆ Requirements Validation</li><li>◆ Development Approach</li><li>◆ Data Conversion Approach</li><li>◆ Testing Approach</li><li>◆ Training and Knowledge Transition</li></ul></li></ul>	<ul style="list-style-type: none"><li>• How many of your associates will be on-site (by role and phase)?</li><li>• Describe in detail the three releases identified in your proposal and what is included in each release.</li><li>• Describe how legacy systems' data and process synchronization will occur during the three release rollout plan.</li><li>• How will data integrity be enforced during the three release rollout?</li><li>• Assuming no external or legislative constraints, describe the most cost effective approach and timeline to meet the project's requirements.</li><li>• What do you see as the most predominant risks to meeting the project's objectives?</li><li>• How much development will be completed on-site vs. off-site?</li></ul>
5	10:45AM-11:00AM	Break		



Ref#	Time	Agenda Item	Description	Additional Instructions/Questions
6	11:00AM-12:00PM	Solution Overview	<ul style="list-style-type: none"><li>• Present the overall solution components focusing on the benefits the agency should expect to derive from the solution.</li><li>• Discuss how your solution meets the project objectives and aligns with the service delivery model of the Unemployment Compensation Claims and Benefits program.</li><li>• Present the process engineering approach you will follow as part of implementing the solution.</li></ul>	
7	12:00PM-1:00PM	Lunch		



Ref#	Time	Agenda Item	Description	Additional Instructions/Questions
8	1:00PM-2:30PM	Solution Architecture	<ul style="list-style-type: none"> <li>• Discuss the technical architecture of your proposed solution.</li> <li>• Focus on the integration of the components:               <ul style="list-style-type: none"> <li>◆ Claimant Portal</li> <li>◆ Employer Portal</li> <li>◆ UC Claims &amp; Benefits System</li> <li>◆ IVR</li> <li>◆ CRM</li> <li>◆ Imaging</li> <li>◆ Document Management</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• What is the backup strategy?</li> <li>• Describe your capacity planning methodology?</li> <li>• What variables and values were used to model your proposed hardware configuration?</li> <li>• Does your proposed hardware and software configuration include development, test, training, pre-production, and production environments?</li> <li>• Are the environments virtual or actual (e.g., partitions on the same unit or completely different units)?</li> <li>• What is the number of concurrent users you are planning to test for? (both internal users and external users)</li> <li>• Describe how you plan to generate the test load.</li> <li>• In your Core System, what is the uptime percentage of the system?</li> <li>• In your Core System, what is the longest period of time the system was down due to maintenance?</li> <li>• In your Core System, what is the longest period of time the system was down due to a system failure?</li> <li>• In your Core System, how many database connections are in the connection pool?</li> </ul>



Ref#	Time	Agenda Item	Description	Additional Instructions/Questions
				<ul style="list-style-type: none"><li>• In your Core System, what is the maximum number of users that this system has been tested for?</li><li>• In your Core System, what is the average amount of time a user is on the system?</li></ul>
9	2:30PM-2:45PM	Break		





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



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Ref#	Time	Agenda Item	Description	Additional Instructions/Questions
11	5:00PM- 5:30PM	Question and Answer		



## 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"><li>• Business Rule Setup</li><li>• Business Rule Maintenance - change, add, remove</li><li>• Business Rule Execution</li></ul>	
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"><li>• Demonstrate the workflow capabilities of the system</li><li>• Demonstrate how work moves from one user to another, and from one step to another within a business process</li><li>• Demonstrate how workflow activities trigger notifications</li><li>• Demonstrate how UC can create or edit workflows</li></ul>	



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"><li>• How bar-coding will be used to identify documents</li><li>• How images will be indexed</li><li>• Image search capabilities</li></ul> Security: <ul style="list-style-type: none"><li>• Setup User Roles</li><li>• Setup Users</li><li>• Maintain Users</li></ul>	<ul style="list-style-type: none"><li>• What data is logged (Security, DB, UI, Middleware, etc.)?</li><li>• How do you handle security of backend systems?(Operating System, Database, Middleware, Application Servers)</li></ul>
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"><li>• Create an account and login to the portal</li><li>• File an initial claim</li><li>• Check the status of their claim</li><li>• Receive request for information and other alerts from the UC Program</li><li>• Respond to requests for information from UC</li><li>• Submit requests for information to UC</li><li>• Receive determinations on their claim</li><li>• File an appeal of a determination</li><li>• File a continuing claim (certify weeks)</li><li>• Request an overpayment waiver</li><li>• Make payment on an overpayment balance</li></ul>	
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"><li>• Create a customer record in the CRM system</li><li>• Update a customer record in the CRM system based on the results of a call</li><li>• Capture all customer interaction, whether live answer, IVR, e-mail, postal mail or web-based.</li></ul> <p>In addition:</p> <ul style="list-style-type: none"><li>• Demonstrate how the CRM system will be integrated with the telephony systems to support screen pops, transfer of customer context with the call, etc.</li><li>• Demonstrate how the CRM system will integrate with the UC application for the transfer of customer information (bi-</li></ul>	



Ref#	Time	Agenda Item	Description	
			directional) <ul style="list-style-type: none"><li>• Demonstrate how the CRM application will integrate with the e-mail management application</li><li>• Demonstrate how the CRM application is used or fits into the agent desktop environment.</li><li>• Demonstrate the reporting available out of the CRM system</li></ul>	
10	4:00PM-5:00PM	Employer Portal	Demonstrate how employers will use the employer portal to: <ul style="list-style-type: none"><li>• Create an account and login</li><li>• Review current and historical claims</li><li>• Respond to requests for information from UC</li><li>• Receive determinations</li><li>• File an appeal</li><li>• Request information from UC</li><li>• Apply for Short Term Compensation (STC) assistance</li></ul>	
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	Demonstrate how UC staff will use the system to: <ul style="list-style-type: none"><li>• View their to-do/work lists</li><li>• Enter an initial claim</li><li>• Determine eligibility for Unemployment Benefits</li><li>• Process combined wage claims (multi-state)</li><li>• Approve an initial claim</li><li>• Flag a claim for potential issues</li><li>• Process claims for Emergency Unemployment Compensation</li><li>• Set up business rules for and process Extended Benefits</li><li>• Set up and process Disaster Unemployment Assistance (DUA)</li><li>• Set up and process Short Term Compensation (STC)</li></ul>	<ul style="list-style-type: none"><li>• Describe how your proposed solution addresses Wage Determination and any associated wage issues.</li></ul>
2	10:30AM-10:45AM	Break		





Ref#	Time	Agenda Item	Description	
3	10:45AM-12:00PM	UC Program Workspace - Adjudication	Demonstrate how UC staff will use the system to: <ul style="list-style-type: none"> <li>• View their to-do/work lists</li> <li>• Communicate with claimants and employers</li> <li>• Process potential separation issues</li> <li>• Process potential non-separation issues</li> <li>• Determine employer chargeability</li> </ul>	<ul style="list-style-type: none"> <li>• Please explain the following statement from your proposal. "In those instances where a single claim has multiple issues, duplicative activities on various plans can be captured and managed in a consolidated fashion, rather than forcing an adjudicator to toggle between multiple cases."</li> <li>• What percentage of non separation issues do you project to be automated? Do you have this methodology in production?</li> </ul>
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"> <li>• View their to-do/work lists</li> <li>• Create an Appeal</li> <li>• Schedule Appeal Events</li> <li>• Document Hearings</li> <li>• Document Appeal Decisions</li> <li>• Correct Determinations</li> </ul>	



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"> <li>• View their to-do/work lists</li> <li>• Issue a payment</li> <li>• Certify Weeks</li> <li>• Issue Duplicate Affidavits</li> </ul>	<ul style="list-style-type: none"> <li>• How are fund adjustments processed?</li> </ul>
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"> <li>• View their to-do/work lists</li> <li>• Conduct a wage audit</li> <li>• Conduct a new hire audit</li> <li>• Set up an overpayment</li> <li>• Receive and reconcile payments</li> <li>• Create and remove an overpayment stop</li> <li>• Setup a waiver of an overpayment</li> <li>• Conduct Investigations</li> </ul>	<ul style="list-style-type: none"> <li>• Be prepared to demonstrate /describe how an overpayment can be setup without a UC claim being established.</li> <li>• Describe how overpayments are managed through the 'fail to pay and disposition' process, i.e., courts, collection agencies.</li> <li>• Describe how an overpayment under multiple claims and multiple programs will be set up.</li> </ul>



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"><li>• Provide detailed breakout of each operations and maintenance component by year.</li><li>• Provide detailed breakout of software and hardware costs.</li><li>• Be prepared to discuss any and all options to eliminate, reduce, or defer costs.</li><li>• Be prepared to discuss the cost of performing development activities on site in Tallahassee, Florida.</li></ul>
10	5:00PM-5:30PM	Question and Answer		

Day-3 Meeting Adjournment at 5:30PM