State of Florida

Agency for Workforce Innovation

UC Modernization Project - Phase 2b

Unemployment Compensation Claims and Benefits Information System (UCCBIS)

Presentations Workbook - Accenture

TABLE OF CONTENTS

1 INSTRUCTIONS

1.1 LOGISTICAL INFORMATION

1.1.1 Meeting Location

Tallahassee, FL – Winewood Building 5, Room 109

1.1.2 General Meeting Times

- Preliminary Negotiations and Demonstrations will be conducted between 8:30AM and 5:30PM Eastern Time.
- Meeting room will be open at 8:00AM for Respondents to setup equipment.
- Meeting room will be secured at 6:00PM. Respondent equipment may be left in the room; however, the Agency is not responsible for any lost or stolen equipment.

1.1.3 Demonstration and Preliminary Negotiations Schedule

The Agency anticipates a series of demonstrations and preliminary negotiation sessions to occur between August 31 and September 23, 2010. The sessions will be conducted in Tallahassee, Florida with the location to be announced. The Demonstration and Preliminary Negotiations sessions are scheduled for:

Dates	Respondent
August 31 – September 2, 2010	Tata Consultancy Services
September 7 – 9, 2010	IBM
September 14-16, 2010	Accenture
September 21-23, 2010	Deloitte

2 MEETING AGENDA

2.1 DAY – 1

Ref #	Time	Agenda Item
1	8:30AM - 8:40AM	Meeting Kickoff

Description
• Instructions and administrative activities.

Summary

Prepared Questions	Non-Prepared Questions

Meeting Kickoff Notes

Ref #	Time	Agenda Item
2	8:40AM– 9:30AM	Company and Team Experience

Description

- Introduce your team. Talk about their relevant experience and the contribution each team member will make to the project.

Summary

- Prime vendor responsible for UC system implementations in Illinois and Texas.
- Completed project to enhance legacy systems in Florida and Kansas.
- Several key team members with AWI specific experience.
- Project Manager was Project Manager for the Illinois implementation and Kansas enhancement projects.
- Development Lead also led FLUID enhancement project and OSST conversion effort (both AWI projects).
- Change Strategy Lead has worked on 3 UC implementation projects (KS, WI and IL)
- BPR Lead has strong relationships with Workforce.
- Design, Development and Test Leads have UC Implementation experience on multiple projects (primarily Illinois).

Prepared Questions	Non-Prepared Questions
• What is your latest successful UC implementation (Core System) similar to Florida's requirements? • How many people are currently supporting your implemented Core System? • 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)?	• Do you have samples of marketing materials and instructions to be available in One Stops or sent out in bulk mailings?

Company and Team Experience Notes

Ref #	Time	Agenda Item	Description
3	9:30AM-9:45AM	Break	

Ref #	Time	Agenda Item
4 1 of 6	9:45AM–10:45AM	Project Approach (Schedule)

Description

- Present your overall approach for delivering the project.
- Address:
  - **(1) Project Schedule (Phasing)**
  - (2) Requirements Validation
  - (3) Development Approach
  - (4) Data Conversion Approach
  - (5) Testing Approach
  - (6) Training and Knowledge Transition

Summary

- Management team will follow the PMI guideline of "Progressive Elaboration," in which detail is added to the activities section of the project schedule for the upcoming phase as the current phase is completed.
- Schedule broken into 3 SDLC phases with releases at the end of each phase
- Release 1 – Internet Portal. The new Unemployment Claims and Benefits Internet portal that replaces the Florida Unemployment Internet Direct and the Florida Continued Claims Internet Directory systems will be deployed to full production operational status no later than the end of fiscal year 2010-2011.
- Release 2 – IVR/BOSS. The new Call Center Interactive Voice Response System and the Benefit Overpayment Screening System will be deployed to full production operational status no later than the end of fiscal year 2011-2012.
- Release 3 – Core System. The new Internet and Intranet Appeals System and the Claims and Benefits Mainframe System will be deployed to full operational status no later than the end of fiscal year 2012-2013.
- Propose production pilots

Prepared Questions	Non-Prepared Questions
• How many of your associates will be on-site (by role and phase)? • Describe in detail the three releases identified in your proposal and what is included in each release. • 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?	

Project Approach (Schedule) Notes

Ref #	Time	Agenda Item
4 2 of 6	9:45AM– 10:45AM	Project Approach (Requirements Validation)

Description

- Present your overall approach for delivering the project.
- Address:
  - (1) Project Schedule (Phasing)
  - **(2) Requirements Validation**
  - (3) Development Approach
  - (4) Data Conversion Approach
  - (5) Testing Approach
  - (6) Training and Knowledge Transition

Summary

- The Accenture team commits to tracking and verifying the requirements throughout the project's development life cycle. For changes, we work with AWI to identify the impact and follow the change control process.
- Requirement validation includes Joint Application Development (JAD) sessions with selected staff across all business areas. We confirm business processes, requirements and impacted systems.
- Propose one to four JAD sessions during the week to maintain pace with development and send agendas at least five (5) business days in advance to participants.
- Session topics and attendees are pre-selected to maximize AWI staff's time. This also ensures key decision makers are present. Experienced technical and functional staff participate and answer questions and concerns.
- Following each requirement validation session, Accenture will disseminate meeting minutes to AWI staff then a draft is prepared outlining issues addressed, decisions made and business rules linked to the requirements, workflows, forms, and other items and will be provided to the Agency's Project Director within three days of the session's conclusion.
- Propose to use the transfer solution as a prototype in design sessions to confirm expectations and gain consensus

Prepared Questions	Non-Prepared Questions

Project Approach (Requirements Validation) Notes

Ref #	Time	Agenda Item
4 3 of 6	9:45AM– 10:45AM	Project Approach (Development Approach)

Description

- Present your overall approach for delivering the project.
- Address:
  - (1) Project Schedule (Phasing)
  - (2) Requirements Validation
  - **(3) Development Approach**
  - (4) Data Conversion Approach
  - (5) Testing Approach
  - (6) Training and Knowledge Transition

Summary

- CMMI based development approach and processes
- Development approach broken into 3 SDLC phases with releases at the end of each phase
- Release 1 – Internet Portal. The new Unemployment Claims and Benefits Internet portal that replaces the Florida Unemployment Internet Direct and the Florida Continued Claims Internet Directory systems will be deployed to full production operational status no later than the end of fiscal year 2010-2011.
- Release 2 – IVR/BOSS. The new Call Center Interactive Voice Response System and the Benefit Overpayment Screening System will be deployed to full production operational status no later than the end of fiscal year 2011-2012.
- Release 3 – Core System. The new Internet and Intranet Appeals System and the Claims and Benefits Mainframe System will be deployed to full operational status no later than the end of fiscal year 2012-2013.
- Accenture uses a rapid prototyping approach to configure and determine the modifications required for the AWI solution. Using the IBIS transfer solution as a baseline, the design team can present existing system constructs (screens, correspondence, etc.) and identify updates on the spot based on the specific AWI business requirements.

Prepared Questions	Non-Prepared Questions
• How much development will be completed on-site vs. off-site? • 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?	•

Project Approach (Development Approach) Notes

Ref #	Time	Agenda Item
4 4 of 6	9:45AM– 10:45AM	Project Approach (Data Conversion Approach)

Description

- Present your overall approach for delivering the project.
- Address:
  - (1) Project Schedule (Phasing)
  - (2) Requirements Validation
  - (3) Development Approach
  - **(4) Data Conversion Approach**
  - (5) Testing Approach
  - (6) Training and Knowledge Transition

Summary

- Propose a combined effort with the Agency
- Have prior experience and knowledge of the current UC databases that must be converted
- Propose to convert data in 3 phases mapped to the implementation schedule:
  - Release 1 – Unemployment Claims and Benefits Internet Portal
  - Release 2 – Call Center Interactive Voice Response (IVR) System and Benefit Overpayment Screening
  - Release 3 – Internet and Intranet Appeals System, the Claims and Benefits Mainframe System, and Imaging System
- Approach involves the following high level activities:
  - Develop comprehensive Conversion Plan and schedule
  - Determine, with AWI assistance, the legacy systems source data fields for all legacy system data elements
  - Identify missing database
  - Recommend procedures for handling missing data
  - Develop data maps for each legacy system
  - Design all conversion applications
  - Develop and run legacy system downloads
  - Develop and test data conversion software
  - Develop and test automated data cleanup software
  - Run conversion software for unit, system and acceptance test
  - Develop detailed conversion procedure
  - Run mock conversions
  - Analyze conversion results
  - Correct programs or data for errors
  - Re-run mock conversions
  - Run automated data conversion process
  - Conduct manual conversions

Prepared Questions	Non-Prepared Questions
• Describe and discuss the data conversion tasks and who the responsible party is for completing each data conversion task.	• What are your data conversion roles and responsibilities? • What are AWIs data conversion roles and responsibilities? • Describe approach for data conversion validation and reporting of the converted data? • Are there multiple iterations (mock conversions) planned for data conversion?

Project Approach (Data Conversion Approach) Notes

Ref #	Time	Agenda Item
4 5 of 6	9:45AM– 10:45AM	Project Approach (Testing Approach)

Description

- Present your overall approach for delivering the project.
- Address:
  - (1) Project Schedule (Phasing)
  - (2) Requirements Validation
  - (3) Development Approach
  - (4) Data Conversion Approach
  - **(5) Testing Approach**
  - (6) Training and Knowledge Transition

Summary

- Testing approach integrates with the full project lifecycle and begins with gathering and validation of the requirements.
- Each stage of the effort includes activities to verify and validate the work products from the previous stage are correct and meet the business and technical requirements. This reduces the amount of rework during later stages and helps keep to the project schedule.
- Test script documentation begins during the design phase to verify the system, as designed, meets the validated requirements.
- Tests are reused within a release (for regression of fixes) and across releases (as enhancements are made), providing a consistent level of testing with a minimal level of effort
- The goal is to confirm a code module is functional before it leaves the Development Team. Our Test Team accomplishes this goal by establishing and adhering to a coding standard, using industry standard languages, rigorous documentation, peer reviews, and unit testing.
- All code modules and documentation are peer reviewed before passing the code to the next test phase.
- Document updates for each code module occur during the peer review process. The result provides a tested module that consists of software code, documentation and release notes.
- Unit testing includes testing of all logic branches, field-level business rules, maximums, minimums, field formats, file structure, error and exception handling.
- Use Rational ClearQuest™ for defect and test tracking.

Prepared Questions	Non-Prepared Questions
	• What kind of High Availability testing was performed for the system implemented that closely reflects Florida's requirements? • Describe approach to regression testing? • How will Operability Test be performed in production after initial roll-out for subsequent releases?

Project Approach (Testing Approach) Notes

Ref #	Time	Agenda Item
4 6 of 6	9:45AM– 10:45AM	Project Approach (Training and Knowledge Transfer)

Description

- Present your overall approach for delivering the project.
- Address:
  - (1) Project Schedule (Phasing)
  - (2) Requirements Validation
  - (3) Development Approach
  - (4) Data Conversion Approach
  - (5) Testing Approach
  - **(6) Training and Knowledge Transition**

Summary

- myBIS Training is role-based, meaning that it would target specific work items and business or support processes training to the appropriate level of staff within the process
- Training is aimed at skill acquisition and helping end-users become self-sufficient in the use of the myBIS Solution
- The first step is conducting a user needs assessment to determine user roles based on functions they perform currently and what they will do in myBIS
- Based on the assessment, we develop a detailed training plan that is right for AWI and addresses the knowledge and skills required for the AWI UC system users to use the new myBIS application
- Along with the instructor facilitation, participants perform practice and test exercises using a production-like training environment permitting new skill practice and enhanced learning
- myBIS training is delivered “just in time,” or approximately 30 days before going live on each of the three (3) releases and in accordance with the training schedule
- Training Methodology:
  - Plan - Work with AWI to conduct an end user needs assessment of UC staff. Based on the results, we develop the overall Training Plan and refine the training curriculum for each audience group
  - Design - During this phase we work with AWI to determine the specific user roles for a given release
  - Build – Develop training materials
  - Test – Test training materials to validate the courses meet the learning objectives
  - Deploy - Deliver the training to the end users at the AWI training facilities by prepared
  - trainers, virtually, or at the users’ desktop
- Training Types: Instructor Led, Web-based and job aids
- Knowledge transfer begins early in the project schedule and continues throughout the project lifecycle
- Approach leverages the “learn-by-doing” concept

Prepared Questions	Non-Prepared Questions

Project Approach (Training and Knowledge Transfer) Notes

Ref #	Time	Agenda Item	Description
5	10:45AM-11:00AM	Break	

Ref #	Time	Agenda Item
6	11:00AM-12:00PM	Solution Overview

Description

- 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.

Summary

- The solution Accenture is proposing for Florida – myBIS -- is their enhanced transfer from Illinois
- Continue to implement a state-of-the-art custom system – Illinois Benefit Information System (IBIS) – to replace the existing legacy Benefits Information System
- Four releases of IBIS have been successfully implemented:
    - Internet Claims: nearly 1 million claims since go-live in July 2005
    - Guided Interview: over 1.4M issues completed since go-live in November 2005
    - Auto Registration: over 379,000 claimants automatically registered with Illinois Skills Match since go-live in March 2006
    - Internet Certification: over 1.5M certifications since go-live in May 2009, reducing the load on the IVR System
- myBIS has all the current federal rules from the latest round of American Recovery and Reinvestment Act (ARRA) changes
- Accenture will implement a fully automated application that supports AWI's business processes
- myBIS will interface with Employ Florida Marketplace (EFM) to register claimants.
- The Self Service Portal can expand the existing continued claim access to nights and weekends, providing 24x7 availability for claimants
- Regardless of the continuing claim channel, continuing claims are processed using a consistent set of business rules
- myBIS supports end-to-end claims processing from claims to adjudication to payments which tracking history and accounting throughout
- myBIS integrates claims with payments and BPC function which validates claim data to stave off incorrect issuances from the source

Prepared Questions	Non-Prepared Questions
• Will AWI have the capability of modifying the benefit system as needed, or will AWI be required to contract with Accenture for any modifications to myBIS? • Proposal states the myBIS solution is proprietary. Discuss any impacts to AWI for selecting a vendor that has a proprietary solution.	• What % of the proposed solution is currently in production and what % will need to be developed specifically for Florida's requirements?

Solution Overview Notes

Ref #	Time	Agenda Item	Description
7	12:00PM- 1:00PM	Lunch	

Ref #	Time	Agenda Item
8	1:00PM- 2:30PM	Solution Architecture

Description

- Discuss the technical architecture of your proposed solution.
- Focus on the integration of the components:
  - Claimant Portal
  - Employer Portal
  - IVR
  - CRM
  - Imaging
  - Document Management
  - UC Claims & Benefits System

Summary

- myBIS uses IBM WebSphere as the Application Server and IBM HTTP Server (IHS) as the Web Server
- The Genesys CIM platform provides the telephony platform that enables telephone-based access
- The IBM DB2 LUW relational database integrates, manages, and stores myBIS data
- myBIS automates workflow processes through application embedded workflow functionality
- ImageAPI's iCenter is the foundation of the document management solution component that enables myBIS to store and retrieve imaged documents, correspondence and account information
- The solution uses, Pitney Bowes DOC1, for creating correspondence templates
- Batch processing capabilities are built using the popular Spring Batch Framework
- myBIS Reporting solution leverages the Business Objects reporting tool for reports
- The solution leverages proven off-the-shelf tools including:
  - BMC Patrol Express: monitors system servers and databases
  - WebSphere Management Console: to monitor WebSphere Application Server
  - DB2 Performance Monitor: to monitor DB2 database performance
- Rational Application Developer (Java IDE): to code and unit test the java-based components that run on WebSphere
- Rational Suite will be used to perform system development lifecycle activities
- The heart of myBIS CRM layer is based on the Microsoft Dynamics CRM product
- Genesys Workforce Management - feature enables forecasting staffing levels, flexibly managing agent schedules, and accurately tracking workforce performance and results
- Microsoft Enterprise Search / Fast Search and Transfer (FAST) Search Platform
- myBIS business logic is currently coded into the application.

Prepared Questions		Non-Prepared Questions
• 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 are planning to test for? (both internal users and external users)	• Describe how you plan to generate the test load. • In your Core System, what is the uptime percentage of the system? • In your Core System, what is the longest period of time the system was down due to maintenance? • In your Core System, what is the longest period of time the system was down due to a system failure? • In your Core System, how many database connections are in the connection pool? • In your Core System, what is the maximum number of users that this system has been tested for? • In your Core System, what is the average amount of time a user is on the system?	• What is the maximum memory footprint per user? • What challenges did you discover during development? • What challenges did you discover at implementation? • What challenges is the implemented system is facing now? • What was the actual % Out of the box Utilization? • What Raid configuration is used for the DB and App servers?

Solution Architecture Notes

Ref #	Time	Agenda Item	Description
9	2:30PM 2:45PM	Break	

Ref #	Time	Agenda Item
10	2:45PM– 5:00PM	General System Functions – System Generated Correspondence

Description

Demonstrate the following system functionality:
Generate System Correspondence:

- Create Correspondence Templates
- Generate Correspondence
- Generate Mass Correspondence

Summary

- Correspondence Software: Pitney Bowes DOC1, Experian QAS ProWeb
- Ability to associate required and optional sections to a template, reliable word processing features, define and associate variables with forms/correspondence
- Manages e-forms while still providing flexible options for paper-based mailings
- System verifies addresses in real time against the USPS using QAS Pro Web software by Experian
- Could allow UC staff to generate forms and correspondence by accessing the Electronic Case Folder (ECF) with the ability to search by correspondence type, claimant ID, or other index value
- Ability to preview forms and correspondences before they are generated
- Nightly batch processes can be scheduled to generate forms and correspondence consistent with business cycles
- Documents contain barcodes with a unique client and transaction identifier for all incoming and outgoing forms and correspondence
- When customer returned correspondence arrives at the central office, an automated process scans it, images it, indexes it, and creates a workflow activity, notifying the appropriate AWI staff that the completed correspondence piece is available
- Will work with AWI users to determine which pieces of outgoing correspondence need to be stored in the content management solution
- Flexibility to generate and distribute forms and correspondence locally or centrally regardless of frequency, through various channels including: Batch / Print Centrally, On-Demand Print Locally (On-Demand), E-mail, Fax from User Desktop, User Option to Print/Mail Locally or at the Central Print/Mail Facility
- Form / correspondence repository captures important data and transaction information for the outbound items
- Multiple testing phases using current and newly designed forms and correspondence as well as using converted data

Prepared Questions	Non-Prepared Questions
• Be prepared to describe and demonstrate current installations' "help" screens for claims, adjudication, appeals, BPC and give examples.	• Does the vendor currently have the functionality of electronic communication capability for claimants and employers, in production? • If issues arise in web or IVR claims taking, will fact-findings related to specific issues be mailed or emailed automatically to claimants? • What are the drivers of the limit to how much data can be merged into a correspondence template?

General System Functions –System Generated Correspondence

Ref #	Time	Agenda Item
10 1 of 2	2:45PM– 5:00PM	General System Functions – Advanced Search, Document Management

Description

Demonstrate the following system functionality:
Document Management
- 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

Summary

- Document Management Software: ImageAPI iCenter Image Capture
- Electronic Case Folder integrates case management and document management to share information, allowing for collaboration among users
- Documents and correspondence can be maintained within a single repository
- Any user with appropriate privileges can view case documents via the Electronic Case Folder regardless of their location
- Provides the ability to search, re-index, re-categorize, and annotate existing documents based on security rights
- Solution includes Enterprise Search Service capabilities to perform advanced searches across various documents and data repositories
- Advanced Search Software: Microsoft Enterprise Search / Fast Search and Transfer (FAST) Search Platform includes word stemming, federated search, reliability, performance and ease of integration within the overall architecture

Prepared Questions	Non-Prepared Questions
• Be prepared to describe and demonstrate current installations' "help" screens for claims, adjudication, appeals, BPC and give examples.	• Does the vendor currently have the functionality of electronic communication capability for claimants and employers, in production? • If issues arise in web or IVR claims taking, will fact-findings related to specific issues be mailed or emailed automatically to claimants?

General System Functions – Advanced Search, Document Management

Ref #	Time	Agenda Item
10 2 of 2	2:45PM– 5:00PM	General System Functions – Reporting

Description

Demonstrate the following system functionality:
Reporting:

- 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

Summary

- Software: integrates Business Objects coupled with the DB2 database
- Preconfigured and easily tailored standard Federal and State reports
- Batch reports (also called standard reports) are reports that are created and delivered on a pre-defined basis (daily, weekly, monthly, quarterly, or annually)
- On-demand reports are structured reports defined, created and saved in the report library by a user's initiation
- AWI will be able to protect information and restrict it based on security access and business need
- Staff can schedule jobs and receive automated alerts and reminders
- Will be able to track the report when initiated: when it ran; who ran it; how long it ran; whether it was successful; and how many records were involved
- Workflow enables routing reports or extracts for review
- Accenture will create summary tables, materialized views and report-specific database tables to provide better performance for report generation
- Propose creating a copy of the transactional database as a reporting database
- Business Objects captures status from the review (such as rejected or approved), the reviewer's name, and the review date
- Ability to export information to a broad list of standard formats including, XML, Adobe PDF, rich text format (RTF), Microsoft Word, Text files (tab separated, comma separated, and character separated), Microsoft Excel, and HTML
- Multiple testing phases using current and newly designed reports and converted data
- During the testing phase, AWI SMEs take an active role to make sure the reports are designed as needed, display the information properly and allow access to users across offices
- The tests confirm reports are set up correctly, follow established business practices, and meet the distribution method, format and language requirements

Prepared Questions	Non-Prepared Questions

General System Functions – Reporting Notes

Ref #	Time	Agenda Item
11	5:00PM-5:30PM	Question and Answer
Description		
Summary		
Prepared Questions	**Non-Prepared Questions**	

Question and Answer Notes

Day-1 Meeting Adjournment at 5:30PM.

2.2 Day – 2

Ref #	Time	Agenda Item
1	8:30AM– 9:30AM	General System Functions – Business Rules

Description

Demonstrate the following system functionality:

- Business Rule Setup
- Business Rule Maintenance – change, add, remove
- Business Rule Execution

Summary

- Software (business rules engine): JBoss Enterprise BRMS and embedded in program code
- To make the process of updating dynamic business logic even more streamlined, we are proposing to incorporate the JBoss Enterprise BRMS
- Includes a rules engine and rules development, management, and repository
- Enables trained business analysts to view and manage AWI business rules as encoded in the AWI application infrastructure
- Requires less development time to update applications, application deployment and business processes with the latest business rules and policies delivering the business agility required to respond to changes in requirements
- Improves business agility, reduces costs, and improves user satisfaction
- UC specific object model is a collection of components that describe business rules and functions, and incorporates components for Claims, Benefit Payment Processing, Benefit Payments Control, Appeals and Adjudication from previous UC projects
- Business logic is currently coded into the application
- Dynamic parameters with the potential to change frequently are stored in the database and can be easily updated via a simple script
- Parameter changes do not require modifications to application code

Prepared Questions	Non-Prepared Questions
	• What specific system/business areas are controlled by the business rules engine (i.e., workflow, IVR/Internet application questions/flow, fact finding, reports, portal, etc.)?

General System Functions – Business Rules Notes

Ref #	Time	Agenda Item	Description
2	9:30AM-9:45AM	Break	

Ref #	Time	Agenda Item
3	9:45AM–10:45AM	General System Functions – Workflow

Description

Demonstrate the following system functionality:

- 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

Summary

- Workflow Software: Oracle BPM and embedded program code
- Automates workflow processes through application embedded workflow functionality
- Proposing to supplement our embedded workflow component with the Oracle BPM Suite
- Will work with AWI during design to identify key business processes that could benefit from the Oracle BPM workflow component
- Provides the ability to route work tasks/activities to various users in a business process
- Eliminates many manual tasks through workflow automation
- Routes work to the right AWI staff member based on their role and skills
- Requires minimal effort to reflect business process and workflow changes
- Intelligently invokes other capabilities in the context of AWI staff workflows
- Monitors assigned work to make sure it is completed on a timely basis

Prepared Questions	Non-Prepared Questions
	• Upon entering claim ID information, will the screens all update or will we have to enter claim ID info on all screens individually? • What common processes are not supported in the system?

General System Functions – Workflow Notes

Ref #	Time	Agenda Item
4	10:45AM– 11:45AM	General System Functions – Imaging & Security

Description

Demonstrate the following system functionality:
Imaging:
- How bar-coding will be used to identify documents
- How images will be indexed
- Image search capabilities

Security:
- Setup User Roles
- Setup Users
- Maintain Users

Summary

- Document Management Software: ImageAPI iCenter Image Capture
- Provides the ability to search, reindex, re-categorize, and annotate existing documents based on security rights
- Provides image capture, email and fax-to-image, content redaction capabilities, and indexing processes
- Enables storage and retrieval imaged documents, correspondence and account information regardless of the source
- Framework includes centralized storage and an image scanning facility
- Accenture has successfully implemented correspondence imaging system with Image API at various clients
- Currently being used at AWI, and it is known by the AWI staff
- Current images in the iCenter repository don't need to be converted to a new system
- Built on a scalable architecture comprised of product layers
- Follows AWI processes with automated workflow capability enabling enterprise-wide collaboration, approvals, and better management
- Supports effective content use by delivering controlled, transparent access, storage and publication of large volumes of documents
- Leverages work Image API has done helping the State of Florida achieve many of its goals for improving processes through automation, content management solutions, and business processing.
- Security provided by IBM WebSphere as the Application Server and IBM HTTP Server (IHS) as the Web Server
- Solution incorporates security from various levels within the technology which includes network, servers, access, and application levels
- Symantec Virus Scan for File Uploads

Prepared Questions

- What data is logged (Security, DB, UI, Middleware, etc.)?
- How do you handle security of backend systems?(Operating System, Database, Middleware, Application Servers)

Non-Prepared Questions

- Security: Describe and demonstrate security from both and internal and external perspective.
- If issues arise in web or IVR claims taking, will fact findings related to specific issues be mailed or emailed automatically to claimants?

General System Functions – Imaging & Security Notes

Ref #	Time	Agenda Item	Description
5	11:45AM-12:45PM	Lunch	

Ref #	Time	Agenda Item
6	12:45PM-2:00PM	Claimant Internet Portal

Description

Demonstrate how the claimant will perform the following activities:

- 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

Summary

- Deployed by June 30, 2011
- UC staff, new and existing claimants, employers and Third Party Agencies (TPA) have 24X7 access to claims data, appeals and/or documentation
- Provides customers with the ability to perform a number of self service tasks that may have previously required UC staff intervention
- Enables claimants to create and maintain account information, file claims, view benefit payment information, and complete continued claim certifications.
- Employers and TPAs with the appropriate security can access frequently requested documents, browse FAQs, and view and enter appeals information for cases to which they are a party

Prepared Questions	Non-Prepared Questions
	• Is the claimant internet portal on-line 24/7? Is there any batch processing that must occur? Is there a mirrored database environment? • Is functionality in place to allow claimant to update personal information and payment type? • How do claimants maintain account details, claim details, correspondences, profile, payment options, and 1099?

Claimant Internet Portal Notes

Ref #	Time	Agenda Item	Description
7	2:00PM- 2:15PM	Break	

<table>
<tr><th>Ref #</th><th>Time</th><th colspan="2">Agenda Item</th></tr>
<tr><td>8</td><td>2:15PM-
2:45PM</td><td colspan="2">Integrated Voice Response (IVR) Solution</td></tr>
<tr><th colspan="4">Description</th></tr>
<tr><td colspan="4">Demonstrate how the claimant will use the IVR to file initial and continuing claims</td></tr>
<tr><th colspan="4">Summary</th></tr>
<tr><td colspan="4">

The Genesys CIM platform provides the telephony platform that enables telephone-based access to myBIS
The myBIS application integrates seamlessly with the proposed Genesys Voice Platform and myBIS call center components
myBIS also has the capability to provide AWI staff with screen pops of information collected by the IVR that have been intelligently routed to an available agent that supports claim processing
Calls are routed to the IVR for identification, authentication and self-service
Automatic Call Distribution: Calls are distributed through defined ACD rules
Time of Day: Calls are managed based on the time of day
Call Treatment: Genesys ACD handles the call based on set rules at the ACD level and routes calls to pre defined destinations
Prompting: ACD is capable of simple prompting and digit collecting

</td></tr>
<tr><th colspan="2">Prepared Questions</th><th colspan="2">Non-Prepared Questions</th></tr>
<tr><td colspan="2"></td><td colspan="2">

How will claimants create an account in the IVR?
Are claimants assigned a unique claim ID when they file their claim to avoid using the SSN thereafter for security reasons?

</td></tr>
</table>

Integrated Voice Response (IVR) Solution Notes

Ref #	Time	Agenda Item
9	2:45PM-4:00PM	Customer Relationship Management (CRM) Solution

Description

Demonstrate how call center staff will use the CRM solution to:

- 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.

In addition:

- 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-directional)
- 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

Summary

- CRM Software: Microsoft Dynamics CRM
- CRM layer improves customer service by providing a 360° view of customer information and minimizes development effort
- Customizable user interface that connects to the underlying data objects without programmatic extensions
- Functionality includes built in features to perform and document common business interactions while supporting common business practices
- Provides the capability to build the basic user forms and business processes using out of the box user interfaces, while relying on CRM's underlying .Net architecture and APIs to build the more complex and technical application integrations
- Empowers AWI agents to manage customer interactions, make notes, change status, search and report on a call records
- CTI platform associates each call with call data collected from the IVR or Web to perform account lookup and automated screen pop
- AWI Agent desktops will display a caller's account details upon receiving the call or other interaction arrival
- If the caller opts out to speak to an AWI agent, call data collected in the IVR is passed with the call for CRM system automated account lookup and screen pop
- Microsoft Dynamics CRM knowledge base feature is integrated with the Microsoft Dynamics CRM platform providing a robust integrated solution

Prepared Questions	Non-Prepared Questions
	• CRM: What data is stored and how can that data be accessed?

Customer Relationship Management (CRM) Solution Notes

Ref #	Time	Agenda Item
10	4:00PM– 5:00PM	Employer Portal

Description

Demonstrate how employers will use the employer portal to:

- 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

Summary

- Deployed by June 30, 2011
- Employers and TPAs with the appropriate security can access frequently requested documents, browse FAQs, and view and enter appeals information for cases to which they are a party.
- Employers will be able to submit a request for information and documentation using the Self Service Portal.
- JSPs and JSP TagLibs for the Presentation Layer, which results in Internet screens used by Employers

Prepared Questions	Non-Prepared Questions

Employer Portal Notes

Ref #	Time	Agenda Item
11	5:00PM-5:30PM	Question and Answer
Description		
Summary		
Prepared Questions		**Non-Prepared Questions**

Question and Answer Notes

Day-2 Meeting Adjournment at 5:30PM.

2.3 DAY – 3

Ref #	Time	Agenda Item
1	8:30AM– 10:30AM	UC Program Workspace - Claims

Description

Demonstrate how UC staff will use the system to:

- 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)

Summary

- Navigate via a cascade menu that provides navigation options at the business process-level
- Screens contain a drilldown layout
- Consolidation of data from multiple screens into one screen
- Data validation is built into the system
- Error messaging built into the application enforces correct and complete data entry
- Confirmation messaging throughout the system allows the user to confirm key functions before data is submitted and processed
- Data validation rules confirm that initial data entry is correct and vital information is not missing
- Task and assignment screens allow both UC staff and supervisors to view tasks and assignments for the queue they are assigned
- Supervisor level staff have the ability to reassign tasks and assignments
- Includes a batch process that updates prioritization of tasks based on business rules
- Assignment lists are sorted by priority and due date in order to better manage the queue, and monitoring the dashboard alerts the user of past due items
- Completed Assignments page offers a history of task throughput and completion rates for management staff's review
- System Dashboard features office-level statistics that allow management to chart overall task and assignment volumes as well as geographic workload trends

Prepared Questions	Non-Prepared Questions
• Describe how your proposed solution addresses Wage Determination and any associated wage issues.	• How will all claims data be displayed for a specific claimant? • What controls the HCTC transmission and how is it stopped?

UC Program Workspace - Claims Notes

Ref #	Time	Agenda Item	Description
2	10:30AM-10:45AM	Break	

Ref #	Time	Agenda Item
3	10:45PM-12:00PM	UC Program Workspace - Adjudication

Description

Demonstrate how UC staff will use the system to:
- View their to-do/work lists
- Communicate with claimants and employers
- Process potential separation issues
- Process potential non-separation issues
- Determine employer chargeability

Summary

- When the issue is logged, automatically schedules most Adjudications in real time
- System schedules hearings and adjudications based on criteria defined by the Adjudication and Appeals Divisions, including claimant's assigned local office, availability, issue type, language skills, employer stacking, referee training or special expertise
- Scheduler tries to add the new issue to the same adjudicator so they can group the interviews and complete them on the same day
- Navigate via a cascade menu that provides navigation options at the business process-level
- Screens contain a drilldown layout
- Consolidation of data from multiple screens into one screen
- Data validation is built into the system
- Error messaging built into the application enforces correct and complete data entry
- Confirmation messaging throughout the system allows the user to confirm key functions before data is submitted and processed
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Prepared Questions	Non-Prepared Questions
• What percentage of non separation issues does the vendor project to be automated? Do you have this methodology in production?	• Does your system offer the Adjudicator a selection of determinations based on the facts gathered?

UC Program Workspace - Adjudication Notes

Ref #	Time	Agenda Item	Description
4	12:00PM- 1:00PM	Lunch	

Ref #	Time	Agenda Item
5	1:00PM– 2:00PM	UC Program Workspace – Appeals

Description

Demonstrate how UC staff will use the system to:

- View their to-do/work lists
- Create an Appeal
- Schedule Appeal Events
- Document Hearings
- Document Appeal Decisions
- Correct Determinations

Summary

- myBIS appeals functions can facilitate and balance referee workload via work item automation
- Automated Appeals scheduling creates work items for referees and moves cases through the process, leading to more informed and consistent determinations and decisions made more timely
- The system displays a graphical calendar of all hearings, which is sorted by resources belonging to specified groups
- The Appeals business function within myBIS provides paperless appeal cases with ease of access to all UC staff with the appropriate level of security
- The system tracks each appeals case with a single docket number as it progresses through Benefit Appeals, Unemployment Appeals Commission, and the Circuit Court
- Appeals dockets in myBIS may have any one of over 30 docket statuses, which can be customized to include additional statuses if needed
- myBIS calculates the Age of Appeal based on a variety of criteria, which can be tailored to any configuration of dates and/or statuses
- Once a decision is made, the system processes the result and triggers the payment or overpayment processing based on the outcome
- Hearings are auto scheduled and the system sends notices to all parties involved
- Referees can access previously made determinations and case information in one place
- An extension to the myBIS solution will allow for digital recording of the appeals hearings
- Expanded Claims History (ECH) provides an automatically generated log of actions performed on an appeal

Prepared Questions	Non-Prepared Questions
	• Is automated scheduling included in this system? • How are the documents provided for the hearing? • How are reversals handled? • Is there integration with users MS Outlook or do the users have to maintain a calendar in the system?

UC Program Workspace – Appeals Notes

<table>
<tr><th>Ref #</th><th>Time</th><th colspan="2">Agenda Item</th></tr>
<tr><td>6</td><td>2:00PM– 2:30PM</td><td colspan="2">UC Program Workspace – Special Payments</td></tr>
<tr><th colspan="4">Description</th></tr>
<tr><td colspan="4">Demonstrate how UC staff will use the system to:
• View their to-do/work lists
• Issue a payment
• Certify Weeks
• Issue Duplicate Affidavits</td></tr>
<tr><th colspan="4">Summary</th></tr>
<tr><td colspan="4">• The myBIS comprehensive solution allows AWI staff to identify payment deductions, view payment details and accounts for individual payments in daily, monthly, quarterly and yearly financial statements
• myBIS automatically processes payment adjustments and resulting supplements and overpayments
• myBIS would be fully equipped to create and re-issue supplemental and on-demand payments to claimants, employers and second endorsers on a daily basis
• myBIS combines all of the payment calculations performed during a business day in order to issue a single, all encompassing payment, during nightly batch processing
• In the case of a supplemental payment, the amount is automatically calculated by myBIS at the time the adjustment is entered
• Payments are issued via direct deposit by Electronic Funds Transfer (EFT) or debit cards. Warrants may also be printed and issued based on claimant preference
• myBIS contains standardized receivables, collections, and recoupment processing to increase Agency benefit payment efficiency</td></tr>
<tr><th colspan="3">Prepared Questions</th><th>Non-Prepared Questions</th></tr>
<tr><td colspan="3">• How are fund adjustments processed?</td><td>• What payment options does the vendor offer and are all being offered currently in production?</td></tr>
</table>

UC Program Workspace – Special Payments Notes

Ref #	Time	Agenda Item	Description
7	2:30PM-2:45PM	Break	

Ref #	Time	Agenda Item
8	2:45PM– 4:00PM	UC Program Workspace – Benefit Payment Control

Description

Demonstrate how UC staff will use the system to:

- 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

Summary

- myBIS solution offers an integrated approach to all areas of Benefit Payment Control (BPC)
- Continuous early detection is possible with BPC functionality that is fully integrated with Adjudication, Appeals and all Continued Claims activities
- Continuous early detection is possible with BPC functionality that is fully integrated with Adjudication, Appeals and all Continued Claims activities
- myBIS solution creates a single overpayment record for the Weekly Benefit Amount (WBA) and Penalty Weeks
- AWI can use the myBIS solution to continue to take offsets or other withholdings when a claimant opens additional claims after the overpayment is created
- Customized Cross Matches to determine if claimants have received benefits while working and earning wages or if a claimant is ineligible to receive benefits due to re-hire, incarceration, or death
- myBIS will also integrate cross matches that include verifying new hire information to determine if a claimant was hired while receiving benefits
- myBIS could also handle an interstate cross match
- myBIS solution will provide AWI with the ability to accrue collections monies using various repayment methods
- The system applies collections and recoveries to overpayments based on the hierarchy dictated by unemployment law
- myBIS can reverse a repayment
- myBIS can make a refund payment to a claimant or non-claimant, as well as to refund multiple payments at one time
- Accenture will work with AWI to create investigations functionality that will maximize staff efficiency in determining if a claimant and/or employer is in any way abusing the system
- myBIS will be customized to allow for investigations to be triggered through various means
- Within investigations, the system can be tailored to track potential forgery cases

Prepared Questions	Non-Prepared Questions
• 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.	

UC Program Workspace – Benefit Payment Control Notes

Ref #	Time	Agenda Item
9	4:00PM- 5:00PM	Cost Discussion

Description

This time will be set aside to discuss the cost components of the respondent's solution and services.

Summary

- Design, Development and Implementation - $48,231,642
- 1st year of Operations and Maintenance Support - $3,721,426

Prepared Questions	Non-Prepared Questions
• Provide detailed breakout of each operations and maintenance component by year. • 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.	• What was the estimated cost of the Core System solution? • What was the actual cost of the Core System implementation? • In your proposed costs, what costs are included for data conversion?

Cost Discussion Notes

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

Description

-

Summary

Prepared Questions	Non-Prepared Questions

Question and Answer Notes

Day-3 Meeting Adjournment at 5:30PM