



State of Florida
Agency for Workforce Innovation

UC Modernization Project - Phase 2b

**Unemployment Compensation Claims and
Benefits Information System (UCCBIS)**

Preliminary Negotiations and Presentations Agenda

DOCUMENT CONTROL

Revision History

Date	Author	Version	Change Reference
8/04/2010	Andy Loveland	.02	Initial Draft
8/11/2010	Andy Loveland	1.0	Final Version

Quality Review History

Name	Role	Date

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1 INSTRUCTIONS TO RESPONDENTS

1.1 LOGISTICAL INFORMATION

1.1.1 Meeting Location

Tallahassee, Fl – Specific site location TBA

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

1.2 GENERAL INSTRUCTIONS

- The following personnel from the respondent’s proposed team should be in attendance at the presentations: Account Executive, Project Manager, Lead Architect, and UC Subject Matter Experts. It is the Agency’s expectation that the members of the proposed project team will present the material in the agenda.
- Follow the Meeting Agenda as provided in Section 2 below.
- Refer to documentation contained at: <http://www.floridajobs.org/unemployment/ITN/> under To Be Business Processes to provide context and assist in preparation for demonstrations.
- Limit the number of Respondent staff to ten (10) participants due to room constraints.

- Demonstrate the functionality using the proposed system. If it is not possible to demonstrate the functionality, use storyboards (e.g. PowerPoint slides, mock-up system screens) to conceptually present the proposed functionality.
- Discussions with Agency attendees outside of the formal forum are strictly prohibited.
- Respondents are responsible for providing their own lunch and refreshments.
- The Agency shall not provide any equipment (e.g., laptop, projector) or materials (e.g., flip charts) for the Respondent.
- The Agency shall provide one (1) internet connection to the Respondent.
- The Agency shall not allow call-in (remote) participants from the Respondent team. All participants must be present at the venue in person.
- No presentation materials shall be affixed to the walls of the room.
- Agency attendees may ask questions at any time during the Respondent demonstration.
- Agency attendees reserve the right to modify the pre-allocated durations for the agenda items.

1.3 PRESENTATION CONTEXT

The new Claims and Benefits system is expected to meet UC programmatic goals and objectives as well as the goals and objectives set in statute. To that end we request that the respondents utilize their presentation to reflect their ability to help the agency attain the following statutory goals and business objectives that were included in the ITN document.

1.3.1 Statutory Objectives

The statutory goals and objectives for this project are provided in Sections (1) and (2) of Florida Statute 443.1113 (2009):

- (1) To the extent that funds are appropriated for each phase of the Unemployment Compensation Claims and Benefits Information System by the Legislature, the Agency for Workforce Innovation shall replace and enhance the functionality provided in the following systems with an integrated Internet-based system that is known as the "Unemployment Compensation Claims and Benefits Information System:
 - (a.) Claims and benefit mainframe system.
 - (b.) Florida unemployment Internet direct (FLUID), the Agency's current web-based initial claims intake user interface.
 - (c.) Florida continued claim Internet directory (FLCCID), the Agency's current web based continuing claims user interface.
 - (d.) Call center interactive voice response system.
 - (e.) Benefit overpayment screening system (BOSS).
 - (f.) Internet and Intranet appeals system.

(2) The Unemployment Compensation Claims and Benefits System shall accomplish the following main business objectives:

- (a.) Wherever cost-effective and operationally feasible, eliminate or automate existing paper processes and enhance any existing automated workflows in order to expedite customer transactions and eliminate redundancy.
- (b.) Enable online, self-service access to claimant and employer information and federal and state reporting.
- (c.) Integrate benefit payment control with the adjudication program and collection system in order to improve the detection of fraud.
- (d.) Comply with all requirements established in federal and state law for unemployment compensation.
- (e.) Integrate with the Department of Revenue's statewide unified tax system that collects unemployment compensation taxes.

1.3.2 Business Objectives

The UC Program goals and objectives for the new Claims and Benefits system include the following:

Business Objective #1

Create flexible, integrated UC applications, information, and business processes for the UC Program in order to create operational efficiencies.

In support of this objective, a modern UC system will:

- Implement a case management system to store claims, determinations, claimant and employer data, and appeals information. This “one-stop shop” for all UC information will prove vital to reducing the staff time spent on each UC process.
- Make the resource assignments and re-assignments for required work based on the process flow.
- Provide an alert system to inform Agency workers of system or application faults or outages. Prioritize alerts based on work assignments to bring important items to the worker’s attention.
- Provide an integrated imaging system that allows all areas of the organization to share information quickly and effectively while providing the technical capabilities to identify and remove duplicative information.
- Allow staff to monitor their assigned work.
- Allow management to monitor assigned work to their workers under their supervision.
- Eliminate duplicative data entry between disparate systems or within the same system.
- Provide staff training to meet desired skill levels.

Business Objective #2

Provide a consolidated system with user-friendly search criteria to provide internal and external stakeholders, partners, and the general public with easily accessible, secured and “on demand” access to claims data.

In support of this objective, a modern UC system will:

- Consolidate systems to allow customers access to information through the Internet and IVR system.
- Provide immediate access to data to support decision-making processes.
- Provide access to comprehensive data for complete and accurate trend analysis and statistical reporting.
- Provide report customization capabilities.
- Provide self-service capabilities to authorized claimants and employers.
- Provide a browser-based interface conforming to industry web development standards (style sheets and navigation rules).
- Provide automated data population and cascading of data between input screens to improve productivity and reduce data entry errors.
- Provide simultaneous access to data among various users.
- Improve security, both internal and external.
- Increase audit trail capabilities.

Business Objective #3

Provide a system that is fully compliant with Federal and State laws and statutes as well as Agency procedures and rules.

In support of this objective, a modern UC system will:

- Create a system platform that can meet the changing processing needs of the Agency.
- Utilize an accessible and flexible business rules engine.

Business Objective #4

Provide a state-of-the-art technology system architecture that will effectively support the dynamic application processes and modifications required because of legislative changes and Agency needs.

In support of this objective, a modern UC system will:

- Improve system usage and provide consistent application of data elements through increased coordination and integration with IVR and Internet applications.
- Eliminate duplication of technology and share common objects to the fullest extent possible. The IVR and Call Center should use the UC Integrated database and the business objects should be shared with Internet applications.

- Improve ability to manage customer information requests through Customer Relationship Management (CRM) functionality. The CRM capabilities should integrate with the IVR and Call Center and use the UC integrated database to manage customer information requests in an organized manner.
- Mitigate the risks associated with operating and supporting outdated technology.
- Provide a scalable platform with an open architecture to support process improvements and system integration requirements.

The respondents should use these goals and objectives to guide their discussions on the agenda topics found in Section 2.

1.4 DEMONSTRATION AND PRELIMINARY NEGOTIATIONS FORMAT

Pursuant to ITN section B.14, Demonstrations and Preliminary Negotiations sessions are not public meetings, but a complete recording will be made of all meetings. Each Respondent will have the opportunity to caucus, if necessary, before providing answers to specific Agency questions.

Respondent's negotiation team shall include key project individuals who are able to answer any questions that may arise concerning the Response or the demonstration presentation content and are authorized to negotiate the contract. Personnel who are key to the successful performance and negotiation of this Invitation to Negotiate (ITN) requirement are required to participate.

If the Respondent intends to provide any handouts or presentation materials during the session, it shall provide one (1) "original" and twenty (20) duplicate copies, each clearly labeled "duplicate copy". If there are discrepancies in the material or content between the "original" and the "duplicate" copies, the information contained in the original shall prevail. In addition to the handouts, Respondents shall provide one (1) electronic copy in Microsoft Office 2003 on CD-ROM. Such materials are temporarily exempt from the public records law, and are also subject to ITN sections B.7 and C.19 regarding public records and express claims of permanent exemption from the public records law.

1.5 RESPONDENT'S POINT OF CONTACT

Respondents shall provide the Agency with the sole point of contact for the purposes of the Demonstrations and Preliminary Negotiations by completing the "Negotiation Registration Form". The "Negotiation Registration Form" shall be submitted to the Agency before 5 PM Eastern Time on August 20, 2010.

The points of contact with the Agency for purposes of this Negotiation are the Procurement Officers, listed below:

Agency for Workforce Innovation
Attention: Fran Shewan or Sonja (Stokes) Strickland
107 East Madison Street
Caldwell Building, MSC B-047
Tallahassee, FL 32399-4102
Telephone: (850) 245-7466 or 245-7472
Fax: (850) 245-7470
e-mail: fran.shewan@flaawi.com or Sonja.strickland@flaawi.com

Respondents shall not contact any other office or employee of the Agency for information with respect to this Demonstration and Preliminary Negotiation. The Agency shall not be bound by any information from whatever source that does not come from the Agency's Procurement Office or that is not contained within this document.

2 MEETING AGENDA

2.1 DAY - 1

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

Ref#	Time	Agenda Item	Description
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
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

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

Day-1 Meeting Adjournment at 5:30PM.

2.2 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
4	10:45PM-11:45PM	General System Functions - Imaging & Security	Demonstrate the following system functionality: <p>Imaging:</p> <ul style="list-style-type: none"> • How bar-coding will be used to identify documents • How images will be indexed • Image search capabilities <p>Security:</p> <ul style="list-style-type: none"> • Setup User Roles • Setup Users • Maintain Users
5	11:45AM-12:45AM	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	
8	2:15PM-2:45PM	Integrated Voice Response (IVR) Solution	Demonstrate how the claimant will use the IVR to file initial and continuing claims

Ref#	Time	Agenda Item	Description
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-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
10	4:00PM-5:00PM	Employer Portal	<p>Demonstrate how employers will use the employer portal to:</p> <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

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

Day-2 Meeting Adjournment at 5:30PM.

2.3 DAY - 3

Ref#	Time	Agenda Item	Description
1	8:30AM-10:30PM	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)
2	10:30AM-10:45AM	Break	
3	10:45PM-12:00PM	UC Program Workspace - Adjudication	<p>Demonstrate how UC staff will use the system to:</p> <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
4	12:00PM-1:00M	Lunch	
5	1:00PM-2:00PM	UC Program Workspace - Appeals	<p>Demonstrate how UC staff will use the system to:</p> <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
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
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.
10	5:00PM-5:30PM	Question and Answer	

Day-3 Meeting Adjournment at 5:30PM

3 DEMONSTRATION AND PRELIMINARY NEGOTIATION REGISTRATION FORM

RESPONDENT SHALL COMPLETE AND RETURN TO THE ISSUING OFFICE

Complete the information below and fax this sheet to the Agency's Office of Procurement and Contract Administration at (850) 245-7470. The "Negotiation Registration" form shall be returned to the Agency before 5 PM Eastern Time on August 20, 2010.

RESPONDENT'S POINT OF CONTACT

Company Name	
Contact Person	
Address	
City, State, Zip	
Telephone	
Fax Number	
Cell Phone Number	
E-mail address	

For each additional attendee, please provide their name and role as it pertains to this Demonstration and Preliminary Negotiation.

Additional Attendee List		
	Name	Role
1		
2		
3		
4		
5		
6		
7		

Additional Attendee List		
	Name	Role
8		
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