**CUSTOMER SERVICE CENTER (CSC) RFP**

**SOLICITATION #: OS/CSC-15-001-S**

**QUESTIONS and RESPONSES: SERIES 4**

**August 26, 2014**

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| **Question #** | **RFP Section** | **Page #** | **Question / Response** |
| 108. | Printing Requirements |  | Will there be any printing required? (ex: Personalized letter to accompany the application) If so, how many pages need to be printed per literature package? Will there be a need to print out two letters to the same record? How many times will a letter be printed per record (example: first letter, second attempt letter to John Doe)? |
| Response |  |  | Yes. Personalized letters will be required for outgoing packages. Only one letter should be needed per record. Offerors should anticipate some number of printed reports.  |
| 109. | Correspondence / Document Processing Questions.ECMS system | Page 54, A | How many user licenses will be allowed to access the ECMS system? |
| Response |  |  | This will depend on the Offeror’s staffing. All CSRs must have access to the ECMS. |
| 110. |  |  | Does the data, at rest, need to reside at all times within the State of Maryland? Or, can secure storage environments belonging to the bidder in other states be leveraged for data warehousing? |
| Response |  |  | There is not a requirement for a data warehouse in this RFP, although DHR would not prohibit one. Data must be stored in a secure environment belonging to the Contractor and approved in writing by DHR. |
| 111. |  |  | Does Section 3.5.2.2-D apply only to the Cisco border routers provided by the contractor to be located at MD DHR’s locations (SSC Primary and DHRIS)? If not, to what other contractor devices does DHR OTHS require physical and remote access and configuration control? |
| Response |  |  | This applies to all Contractor supplied network equipment regardless of location. See the Response to Question #45. |
| 112. |  |  | Do the requirements for encryption of data in transit, as described in section 3.5.2.2-D, extend to encryption of RTP (voice) traffic |
| Response |  |  | That requirement does not refer to encryption in the RFP. However, the RFP does not require encryption of voice traffic.  |
| 113. |  |  | Does section 3.5.7 – D imply that DHR would require access to the contractor’s virtual disks in a D2D backup system? Or simply would require oversight in the sense of access to artifacts and supporting evidence that the system is in compliance? |
| Response |  |  | Yes. DHR requires access to whatever reporting facilities exist to monitor media utilization and remote and physical access to inspect storage areas. |
| 114. |  |  | Does the annual background check requirement extend to the contractor’s network support vendor(s)? |
| Response |  |  | Yes. |
| 115. |  |  | Does the Average Call Duration column in “Attachment R – Call Volume Matrix” refer to time in the IVR, time with a live agent, or total connected time on the voice circuit? |
| Response |  |  | The Average Call Duration column in Attachment R under the tab “New IVR” refers to the time in the IVR |
| 116. |  |  | Does the call volume data in “Attachment R – Call Volume Matrix” cover call from all 24 local jurisdictions (i.e. Counties), including Baltimore City and the Montgomery County Department of Health and Human Services? |
| Response |  |  | Yes. The call volumes in Attachment R are for all jurisdictions.  |
| 117. | Section 1.39 |  | Non-Visual Access states, “This solicitation does not contain Information Technology (IT) provisions requiring Non-Visual Access.” Section 3.5.1 F states, “Develop and maintain a Section 508 compliant web-based Correspondence workflow process to facilitate electronic Correspondence between Customers and DHR in compliance with the Federal Guidelines for Web Accessibility, available at [www.section508.gov](http://www.section508.gov).” Please explain how the two requirements should be resolved. |
| Response |  |  | See Amendment #2. Any system built requiring public access or access by DHR employees must be Section 508 compliant. |
| 118. |  |  | Section 3.5.1 B states, “Upgrade hardware, software and other related systems, including communication systems as needed and at the expense of the Contractor. All components of the CSC systems must be kept current with industry standards and shall be backwards compatible. This includes functionality across common web-browsers (i.e. Internet Explorer, Firefox, Chrome, Safari, etc.).” Section 3.5.2.2 D states, “OTHS will have full control of the Contractor supplied network equipment, including but not limited to physical and remote access and configuration control.” Please explain the relationship between OTHS having full control of configuration management and the contractor being responsible for keeping current with industry standards. |
| Response |  |  | See the Response to Question #45. DHR will use this access to monitor compliance with the requirement in 3.5.1.B. |
| 119. | General |  | Regarding the state DHR systems and access/integration: What is the database technology that is hosting the state systems? Is it a mainframe system? |
| Response |  |  | There are a variety of systems and databases supporting DHR systems. Because the Offeror will only be accessing flat files via SFTP the actual configurations are not applicable. |
| 120. | 3.2.1. H | 44 | Is the requirement to transfer the customer limited to IVR or is applicable to CRM as well? If applicable to CRM, it is required to transfer along with the screen/data or just voice and is the requirement to transfer with in the CRM system or outside too. |
| Response |  |  | The required is limited to the IVR.  |
| 121. | 3.2.1. P | 45 | Is it expected to get some kind of automated feed from other DHR systems that provide this information (integration), if yes, what kind of interface is available? |
| Response |  |  | See the Response to Question #19. |
| 122. | 3.2.1.O | 45 | Is it expected to adjust the speed of messages on the IVR system dynamically in real-time? |
| Response |  |  | No. |
| 123. | 3.2.1.T | 45 | Which systems does the Contractor need to connect its CRM to? Which systems does the Contractor need to connect its IVR to? If the caller enters a user ID and PIN in the IVR, what “identity” does the state wish to transfer to the CSR? The case record in the CRM? A screen-pop of a State system, such as the EBT system? |
| Response |  |  | See the Response to Question #19 regarding connection to DHR system. The “identity” transferred is based on the record in the CRM and the screen pop should be the initial customer screen from the CRM, not from any State system.  |
| 124. | 3.2.1.T | 45 | Is it expected to only display data entered on IVR (a.k.a Call Attached Data - CAD) or pull the customer information using the CAD from the Benefits system and display to the CSR? |
| Response |  |  | See the Response to Question #124. |
| 125. | 3.2.1.T | 45 | Regarding “Require Customers who have applied for DHR benefits to enter a User-id and pin to gain access to confidential information.” Database Interfacing:* What versions are the state’s DHR Systems?
* Are these systems web accessible?
 |
| Response |  |  | The user ID and Pin will be used to access data within the IVR populated nightly from DHR systems. No customer access will be provided to DHR systems directly. |
| 126. | 3.2.1.U3.2.4.1.B3.3.1.I3.5.1.N | 45485056 | * Regarding- Access and interface with multiple DHR Databases and web services concurrently.
* Regarding- Access DHR systems, interpret screens, update screens and enter Customer Case logs in Administrations’ automated systems.
* Regarding- Integrate with DHR software systems to enable service requests to be filtered through existing systems, allowing for proper tracking and metrics gathering if needed in the future without modifications to DHR systems.
* Regarding- Interface with DHR systems to provide authorized callers with Case specific information, such as child support payment receipt and disbursement information, Food Stamp Issuance information, etc.

Database/web service Interfacing-* What technology would a vendor use to access the DHR systems remotely?
* What versions are the state’s DHR Systems?
* How many systems are web accessible?
* Will the state allow a network communication using an internet site secure VPN tunnel for accessing the state system?
* Please provide details how the vendor will access the DHR systems or database.
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| Response |  |  | See the Response to Question #19. |
| 127. | 3.2.1.V | 45 | Is the contractor expected to interface with DHR databases directly, or via some API? |
| Response |  |  | See the Response to Question #19. |
| 128. | 3.2.1.M,3.3.1.N, 3.5.1.F | 45, 52, 55 | Is the contractor required to provide a public website? If so, please provide details on required functionality. |
| Response |  |  | Yes. The Offeror shall propose functionality within the proposed CRM to meet the requirements of the RFP. |
| 129. | 3.2.1.Z | 46 | Can the State provide detail on what sort of customized reporting it desires for the IVR that goes beyond an IVR’s extensive standard reporting. For example, customizing the look of the reports or do ad hoc queries?Can the State provide an estimate of the number of customized reports it expects to request? |
| Response |  |  | The State will require minor customization to the IVR’s standard reports. The State will require the ability for ad-hoc queries. We cannot provide an estimate of the additional customized reports or ad-hoc queries without knowing the standard reporting features provided.  |
| 130. | 3.2.2.C-E | 46 | Are these transfers limited to IVR only and are ONLY voice transfers? |
| Response |  |  | Yes. |
| 131. | 3.2.3.H | 47 | Are the non-ACD interactions expected to be initiated via agent/CSR desktop or the CRM system, or are they to be outside of the CRM system? |
| Response |  |  | The non-ACD interaction will be initiated by a CSR or other CSC employee and will be outside of the CRM. Making a non-ACD call should not take the CSR out of the queue.  |
| 132. | 3.2.3.L | 47 | Are the ‘transfer’, ‘join’,’ whisper coaching’ and ‘grab’ methods expected to involve data transfer as well or only voice transfers? |
| Response |  |  | The requirement is for monitors to be able to access calls to both listen and monitor the agent’s screen interactions.  |
| 133. | 3.2.4.2.A | 49 | Are the CSRs expected to only answer questions related to filling applications, or actually fill out applications of behalf of the customers in the DHR system?  |
| Response |  |  | CSRs will respond to application questions. The CSR is not expected to complete the application on the phone with the Customer. See the Response to Question #38. |
| 134. | 3.2.4.3 | 49 | Is the Contractor expected to process returned mail? |
| Response |  |  | No. See the Response to Question #104. |
| 135. | 3.2.4.3 | 49 | Should the tracking of mail correspondence be done in DHR system or in the CRM/document management system? |
| Response |  |  | At a minimum mail correspondence should be tracked in the activity log in the appropriate DHR systems. Incoming correspondence should also be tracked in the document management system. Vendor may track the correspondence in their CRM if desired. |
| 136. | 3.3.1.I | 50 | What is the exact scope of filtering of service requests through the existing DHR systems? |
| Response |  |  | The Contractor’s systems will not interface directly with any DHR databases. Data will be transmitted to the Contractor per the Response to Question #19. CSRs will enter the service requests into the CRM. |
| 137. | 3.3.1.K | 51 | Is the CRM expected to store PII, or only pull from DHR system and display after masking? |
| Response |  |  | The CRM is expected to store data to search for and identify a client which will contain PII. Any other case or other types of PII will be accessed through the appropriate system. Data will be masked based on user role.  |
| 138. | 3.3.1.L | 51 | Is there any permitted maintenance time/downtime?  |
| Response |  |  | The vendor shall be permitted maintenance time/downtime per the scheduled and approved plan. Refer to RFP Sections 3.5.5 and 3.5.1.K. |
| 139. | 3.3.1.O.3 | 52 | Should Administration-specific activities be available to customers? |
| Response |  |  | The requirement is for a customer to be able to submit and track a WO. Offerors shall propose how this function and administration activities can be configured in your solution. |
| 140. | 3.4.5.A | 54 | Is the contractor expected to interface the CRM with the ECMS system to link the scanned documents images? |
| Response |  |  | This is not a requirement. The Contractor may do it if desired. |
| 141. | 3.45.1.G | 55 | Are there a minimum number of factors expected to be used for authentication mechanism? |
| Response |  |  | The State requires a minimum of two factor authentication. |
| 142. | 3.5.1.K | 56 | This section talks about approved maintenance, but earlier section calls for 24X7 availability. Is the contractor allowed to take down the system during pre-determined maintenance periods? |
| Response |  |  | Callers must be able to access the CSC at all times including scheduled maintenance. Refer to RFP Sections 3.5.5 and 3.5.1.K. |
| 143. | 3.5.1.N | 58 | Is encryption of online data at rest is expected? |
| Response |  |  | Yes. |
| 144. | 3.6.1, Table 3, Service Item 9 | 72 | The CSC will be a new, expanded contact center, with additional scopes of work. The current call handle times average about 1:30 minutes. By adding new help lines and adding the requirement that the CSRs assist callers will completing applications, it is possible that the RFPs estimate of an average call handle time of less than 300 seconds will turn out to be far off the mark, especially in light of the requirement that the IVR deflect 75% of calls; this will result in simple calls being deflected and complex calls going to a CSR. That said, would the Department consider reevaluating the average call handling time SLA during the first year as the CSC collects and analyzes data on actual calls? |
| Response |  |  | At this time CSRs will answer questions about applications but will not assist customers in completing the applications. The functions selected for the Desk reference guide are designed to fit within the 300 secs SLA. The State will not modify the SLAs at this time. |
| 145. | 3.6.1, Table 3, Quality Item #2 | 73 | Regarding the requirement to have the IVR deflect 75% of calls, can the Department please elaborate on why it anticipates the CSC would experience double the current average rate of 35% in the next contract term? |
| Response |  |  | Based on the CSC call matrix in Attachment R, since the implementation of the new IVR functionality in July of 2013, deflection rate is at an averaging above 70%. Based on the improvement plans for this RFP, an additional 5% deflection is reasonable. |
| 146. | Section 1.34 Living Wage Requirements |  | Please confirm that all contractors subject to the Maryland Living Wage Law are required to pay their covered employees a minimum of $13.19 per hour regardless if the contractor provides the services in a Tier 1 or Tier 2 area. Does the $13.19 per hour include or exclude health and welfare benefits? |
| Response |  |  | This requirement has changed. See Amendment #2 and visit [www.dllr.state.md.us](http://www.dllr.state.md.us) for more information. |
| 147. | 1.41.3 VSBE Goals. |  | Is the 0.5% VSBE goal included in the 10% MBE subcontracting goal or a separate goal? |
| Response |  |  | No, the 0.5% VSBE goal is not included in the 10% MBE subcontracting goal. The VSBE and MBE programs are separate and distinct. The 0.5% VSBE goal is in addition to the 10% MBE subcontracting goal. |
| 148. | 2.1 Offeror Minimum Qualification Requirements |  | Can the prime contractor and subcontractor(s) as a team provide the required two (2) references? |
| Response |  |  | No, the Prime Contractor and subcontractor cannot, as a team, provide the required two (2) references.  The two (2) references must demonstrate the Prime Contractor’s experience.If the Offeror is a subsidiary of another entity, and the parent organization will guarantee the performance of the subsidiary, then references, minimum qualifications, and financial reports, or experience and documentation (e.g. insurance policies, bonds, letters of credit) used to meet minimum qualifications **may** be those of the parent organization (see RFP Section 1.22, Offeror Requirements). See Amendment #2, item #11. |
| 149. | Section 1.44.3, Liquidated Damages |  | Failure to Meet Performance Standards Criteria. Please confirm that the contractor’s liability for paying liquidated damages in the amount of $2K per day is limited to failure to meet the “critical” performance standards in Section 3.6? |
| Response |  |  | Yes. |
| 150. | Section 1.4.4.4 Liquidated Damages – Transition-In Timeline |  | Please confirm that the contractor is liable for paying liquidated damages in the amount of $1K per day only if the overall Transition-In Period is not completed within 6 months, excluding delays not within the control of the contractor. Please confirm that the contractor is not liable for paying liquidated damages if individual tasks within the 6 month transition-in period are delayed as long as the overall transition-in period is completed within 6 months. |
| Response |  |  | The Contractor is liable for paying liquidated damages in the amount of $1K per day if the overall Transition-In Period is not completed within 6 months, excluding delays not within the control of the Contractor. Individual tasks within the project plan must be completed by the date within the approved plan; if not, DHR may impose liquidated damages. Deadlines within the project plan may be adjusted by prior approval of the State Project Manager.  |
| 151. | Section 1.4.4.4 Liquidated Damages – Transition Out Timeline |  | Please confirm that the contractor is liable for paying liquidated damages in the amount of $1K per day only if the overall Transition-Out period is not completed within 6 months, excluding delays not within the control of the contractor. Please confirm that the contractor is not liable for paying liquidated damages if individual tasks within the 6 month Transition-Out period are delayed as long as the overall transition-out period is completed within 6 months. |
| Response |  |  | The Contractor is liable for paying liquidated damages in the amount of $1K per day if the overall Transition-Out period is not completed within 6 months, excluding delays not within the control of the Contractor. Individual tasks within the Transition-Out plan must be completed by the date within the approved plan; if not, DHR may impose liquidated damages. Deadlines within the project plan may be adjusted by prior approval of the State Project Manager. |
| 152. | Section 1.44.5 Liquidated Damages – Support Services & Service Level Agreement |  | Please confirm that the contractor’s liability for paying liquidated damages in the amount of $2K per day is limited to failure to meet the “critical” performance standards in Section 3.5.8? |
| Response |  |  | Yes. |
| 153. | Section 3.2 CSC Services & Requirements |  | Is there a requirement to locate the primary and backup CSC Systems within the State of Maryland or can the contractor locate the primary and backup CSC Systems anywhere within the U.S.? |
| Response |  |  | See Amendment #2. |
| 154. | Section 3.2 CSC Services & Requirements |  | What are the current staffing levels for each CSC position: Project Manager, IT Specialist, Supervisor Manager, Training Lead, and CSR?  |
| Response |  |  | Services requested in this RFP are different from the current contract. Therefore the current staffing levels are not relevant. |
| 155. | Section 3.2.1 IVRS, Item D |  | Please identify the existing toll free telephone number(s). Will the State or the contractor own the toll-free telephone number? Will the State or contractor be responsible for paying the long distance charges? |
| Response |  |  | See the Response to Question #73. The State will pay the long distance charges. |