



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Solicitation

NUMBER
PEI014001

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
GUY NISBET 304-558-2596

RFQ COPY
 TYPE NAME/ADDRESS HERE

VENDOR

SHIP TO

PUBLIC EMPLOYEES INSURANCE
 AGENCY
 601 57TH STREET, SE
 SUITE 2
 CHARLESTON, WV
 25304 304-558-7850

DATE PRINTED
05/22/2014

BID OPENING DATE: 06/03/2014 BID OPENING TIME 1:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO.01						
ADDENDUM ISSUED TO PUBLISH AND DISTRIBUTE THE INFORMATION AS ATTACHED TO THE VENDOR COMMUNITY.						
0001	1	LS	906-20	MS CRM UPGRADE SERVICES		
***** THIS IS THE END OF RFQ PEI014001 ***** TOTAL:						

SIGNATURE		TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE	

WHEN RESPONDING TO SOLICITATION, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

SOLICITATION NUMBER: PEI014001
Addendum Number: No.01

The purpose of this addendum is to modify the solicitation identified as (“Solicitation”) to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

1. Addendum to issue the attached vendor questions and related material.
2. No other changes.

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ATTACHMENT A

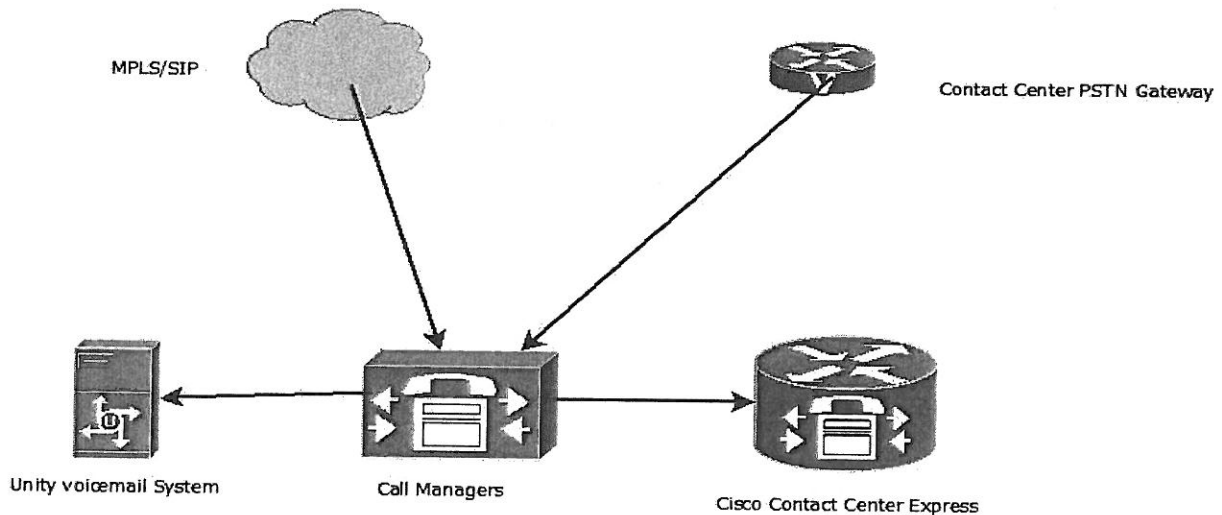
PEI014001
Vendor submitted Questions
and Agency responses.

May 19, 2014

- 1.1 - Mentions that the Cisco phone system is running Call Manager 7.1(5)
- What version of Cisco Unified Contact Center is in use?
>Version 7.0(1)SR05_Build504. The State is planning to upgrade to Version 10x in 2nd Qtr FY15.
 - Is this Cisco Unified Contact Center Enterprise or Cisco Unified Contact Center Express?
>Cisco Unified Contact Center Express. The State is planning to upgrade to CCX10 Enhanced in 2nd Qtr FY15.
 - What version of agent licenses are in use (standard, enhanced or premium)?
>Enhanced
 - Is the contact center environment (servers and software) owned by PEIA or is it also a part of the enterprise system operated by the State?
>It is part of the enterprise system operated by the State.
 - Will the State have a valid Support contact for the server hardware and software during the time period of this project?
>Yes
 - Is the contact center configured in a High Availability (HA) configuration?
>Yes, UCCX is in HA.
 - It looks like all necessary licensing is in place for the Microsoft CRM, what about Cisco. How many users are currently using the system?
>All licensing is in place. The UCCX has 965 users. PEIA has 55 employees.
 - Are there any new endpoints required on the Cisco side?
>No
 - Can PEIA provide the number of contact center agents and supervisors currently using the system?
>The State has about 180 agents actively logged-in during business hours. PEIA has 6 to 10 front line customer service reps (depending on whether open enrollment is occurring) with up to 50 available to take calls if necessary. There are 10 supervisors.
- 4.1.2.1 "Caller identification through CRM"
- Is this new functionality, or is this working today?
It is working today. Per the links below, CID as well as many other features are available if Cisco
> Unified CallConnector is used to integrate UCCX with Microsoft CRM
http://www.cisco.com/c/en/us/products/collateral/customer-collaboration/unified-contact-center-express/data_sheet_c78-483369.html

http://www.cisco.com/c/dam/en/us/products/collateral/unified-communications/unified-callconnector-microsoft-dynamics-crm/data_sheet_c78-341457.pdf
 - Is this in relation to receiving data through screen pop and can PEIA describe what they would like to have happen?
>Yes, when a caller contacts PEIA and enters their information, the customer service rep that accepts the call will have the user's information in CRM on the computer screen.
 - Can PEIA provide an example of what data they would like displayed?

- >Yes, CRM screen shot of existing Account Information Page attached
- Is the caller identification to occur as a result of originating CallerID information, or will the caller need to be prompted to enter account information?
 - >Prompted
- Can PEIA provide a diagram of how the contact center call flows work, including a call out for any database dips or specific routing instructions?



4.1.2.2 Call Recording

- Is this new functionality, or is this working today?
 - >New functionality. UCCX silent recording was functioning, but would now be considered new functionality as it had to be disabled due to security vulnerabilities discovered while enabled. Other calls on other lines were being detected.
- If existing what manufacturer and version is currently deployed?
 - >Only UCCX silent recording
- Will the State have a valid Support contact for the server hardware and software during the time period of this project?
 - >Not likely. Since there isn't a separate call recording system in operation, support will be limited to existing operation capability.

4.1.2.3 Interactive Voice Response and Conversion from speech to text

- Is this new functionality, or is this working today?
 - >New Functionality
- If existing what manufacturer and version is currently deployed?
 - >N/A
- Will the State have a valid Support contact for the server hardware and software during the time period of this project?
 - >N/A

4.1.2.4 – Phone statistical reporting services specific to PEIA users broken down by functional section

- Is this new functionality, or is this working today?
 - >Working today, using UCCX Historical Reports to pull statistics specific to PEIA users

- Can PEIA provide an example or listing of what reports or data they would like to see provided?
>Yes, attached

4.1.2.5 – Skill group automated routing

- Is this new functionality, or is this working today?
>Skill based routing in a working functionality today. However, it isn't expanded into enough options to take advantage of the skill group routing.
- Can PEIA describe how many groups and how many agents per group are to be deployed?
>Yes, 4 groups, 2 to 6 agents per group

4.1.2.6 – Alternate routing

- Is this new functionality, or is this working today?
>New functionality
- Can PEIA describe how this alternate routing should occur?
>Yes, during peak call periods, when call volume exceeds front line capacity, would like the phone system to automatically route calls to another group of employees in the agency, or to outside numbers such as a home phone.

4.1.2.7 – Call Coverage

- Is this new functionality, or is this working today?
>This is working today
- Does this requirement refer to call queuing and how the calls are distributed to the agents?
>Yes and how supervisors can monitor and interfere with agents' state to pick up calls or not.

4.1.3 - Upgrade must occur assuring all existing integrations remain in effect?

- Can PEIA describe what integrations are currently deployed?
>Yes, CRM is integrated, via Biztalk and, or stored procedure calls with:
 - a. COBOL CIS DB2 database to obtain policyholder demographic and policy information,
 - b. Microsoft GP supplemental reporting system(SRS) to obtain premium information,
 - c. Onbase imaging system to allowing viewing of scanned eligibility forms,
 - d. Kofax scanning system to allow for optical character recognition uploading,
 - e. CISCO enterprise phone system for caller identification.

CISCO related integrations: Currently, the main integration is with Cisco Unified Communication Manager (CUCM 7.1.5)

- When would we get to assess their current CRM?
>When you win this solicitation and sign a contract.
- Is there custom code done for CRM?
>Yes, some custom coding was used for Account/Member lookups.
- Are there any integrations between GP and CRM?
>No, it is with the GP SRS.
- Any integrations between other systems and CRM?
>Yes, see reply to integration descriptions above.
- Any 3rd parties for CRM?
>No

Account: [REDACTED]
Information

- Details:**
- Information
 - More Addresses
 - Activities
 - History
 - Sub-Accounts
 - Members
 - Relationships
 - Online Enroll.
 - Workflows
 - Alerts
 - Enrollments
- Quick Links:**
- Minnesota Life
 - HealthSmart
 - ESD System
 - ESI Compass
 - ESI Anchor
 - Face 2 Face
 - Weight Mgmt
 - SPD
 - MED SPD
 - SG
 - MED SG
- Case Management:**
- Cases
- Communications:**
- Marketing Lists
 - Campaigns

General **Current Coverage** All Coverage All Attributes Employment Premium Calculator Administration Notes

Account Name * [REDACTED] **Category** [REDACTED] **Primary Member** [REDACTED]

SSN [REDACTED] **Gender** [REDACTED] **Opted Out Section 125** [REDACTED]

Member ID [REDACTED] **Birth Date** [REDACTED] **VIP** [REDACTED]

Member Type [REDACTED] **Gender** [REDACTED] **Tobacco Status** [REDACTED] **Direct Draft** No Yes

Agency Affiliation

Agency [REDACTED] **Affiliation Date** [REDACTED] **Retired From** [REDACTED]

Survivor Of [REDACTED] **Hire Date** [REDACTED] **Retire Date** [REDACTED]

Contact Information

Street 1 [REDACTED] **ZIP/Postal Code** [REDACTED] **Main Phone** [REDACTED]

Street 2 [REDACTED] **County** [REDACTED] **Work Phone** [REDACTED]

City [REDACTED] **Country** [REDACTED] **Fax** [REDACTED]

State [REDACTED] **E-mail** [REDACTED] **Preferred** [REDACTED]

Cases

Filter on: Active Include: Related "Regarding" Records

New Case [REDACTED] Run Workflow... More Actions

Title	Created On	Customer	Stage	Subject	Case Number	Owner
No Case records are available in this view.						

0 of 0 selected. Page 1

Status: Active

Agent State Summary Report (by Agent)

5/1/2014 8:00:00 AM - 5/22/2014 6:00:00 PM

<u>Agent Name</u>	<u>Extension</u>	<u>Interval Start Time</u>	<u>Interval End Time</u>	<u>Total</u>			<u>Ready Time</u>		<u>Reserved Time</u>		<u>Talk Time</u>		<u>Work Time</u>	
				<u>Logged-in Time</u>	<u>Not Ready Time</u>	<u>70.0%</u>								
Amy Stalnaker	(amy.: 52632	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	120:26:11	84:18:24	70.0%	17:59:01	14.9%	0:30:41	0.4%	14:22:40	11.9%	03:15:25	2.7%
Summary:				120:26:11	84:18:24	70.0%	17:59:01	14.9%	0:30:41	0.4%	14:22:40	11.9%	03:15:25	2.7%
Ann Wilmoth	(ann.l.w 52640	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	101:09:56	37:34:43	37.1%	25:30:55	25.2%	0:37:17	0.6%	31:27:40	31.1%	05:59:21	5.9%
Summary:				101:09:56	37:34:43	37.1%	25:30:55	25.2%	0:37:17	0.6%	31:27:40	31.1%	05:59:21	5.9%
Carolyn Wiesen	(carc 52658	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	43:09:50	16:47:16	38.9%	11:59:30	27.8%	0:18:35	0.7%	11:25:03	26.5%	02:39:26	6.2%
Summary:				43:09:50	16:47:16	38.9%	11:59:30	27.8%	0:18:35	0.7%	11:25:03	26.5%	02:39:26	6.2%
Glenna Nichols	(Gler 52612	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	111:14:33	63:29:05	57.1%	21:51:40	19.7%	0:33:46	0.5%	21:59:13	19.8%	03:20:49	3.0%
Summary:				111:14:33	63:29:05	57.1%	21:51:40	19.7%	0:33:46	0.5%	21:59:13	19.8%	03:20:49	3.0%
Idesha Fox	(idesha.fc 52619	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	92:35:24	19:42:10	21.3%	38:58:50	42.1%	0:46:16	0.8%	24:34:44	26.5%	08:33:24	9.2%
Summary:				92:35:24	19:42:10	21.3%	38:58:50	42.1%	0:46:16	0.8%	24:34:44	26.5%	08:33:24	9.2%
Lisa Conley	(Lisa.Co 52623	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	80:04:55	78:12:06	97.7%	0:08:38	0.2%	0:02:59	0.1%	01:26:10	1.8%	0:15:02	0.3%
Summary:				80:04:55	78:12:06	97.7%	0:08:38	0.2%	0:02:59	0.1%	01:26:10	1.8%	0:15:02	0.3%
Nicole Simpkins	(nicc 52682	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	98:37:16	42:25:03	43.0%	27:17:39	27.7%	0:38:41	0.7%	22:10:13	22.5%	06:05:40	6.2%
Summary:				98:37:16	42:25:03	43.0%	27:17:39	27.7%	0:38:41	0.7%	22:10:13	22.5%	06:05:40	6.2%
Robin Duncan	(Robir 52605	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	92:30:04	49:13:25	53.2%	23:49:51	25.8%	0:31:33	0.6%	16:01:29	17.3%	02:53:46	3.1%
Summary:				92:30:04	49:13:25	53.2%	23:49:51	25.8%	0:31:33	0.6%	16:01:29	17.3%	02:53:46	3.1%
Shannon Blood	(Sha 52671	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	104:48:30	32:06:21	30.6%	25:44:37	24.6%	0:23:56	0.4%	43:01:52	41.1%	03:31:44	3.4%
Summary:				104:48:30	32:06:21	30.6%	25:44:37	24.6%	0:23:56	0.4%	43:01:52	41.1%	03:31:44	3.4%
Shonda Lewis	(Shon: 52603	5/1/2014 8:00:00AM	5/22/2014 11:58:23AM	114:13:54	37:11:05	32.6%	33:03:45	28.9%	0:38:44	0.6%	35:32:16	31.1%	07:48:04	6.8%
Summary:				114:13:54	37:11:05	32.6%	33:03:45	28.9%	0:38:44	0.6%	35:32:16	31.1%	07:48:04	6.8%

All times are server time.

Report generated: 5/22/2014 11:59:10AM (peiaagent)

∞

Agent State Summary Report (by Agent)

5/1/2014 8:00:00 AM - 5/22/2014 6:00:00 PM

<u>Agent Name</u>	<u>Extension</u>	<u>Interval Start Time</u> <u>Interval End Time</u>	<u>Total</u> <u>Logged-in Time</u>	<u>Not Ready Time</u>	<u>Ready Time</u>	<u>Reserved Time</u>	<u>Talk Time</u>	<u>Work Time</u>
Twila Neil	(twila.j.neil 52634	5/1/2014 8:00:00AM 5/22/2014 11:58:23AM	27:14:48	27:14:48 100.0%	0:00:00 0.0%	0:00:00 0.0%	0:00:00 0.0%	0:00:00 0.0%
Summary:			27:14:48	27:14:48 100.0%	0:00:00 0.0%	0:00:00 0.0%	0:00:00 0.0%	0:00:00 0.0%
Yolonda Tyler	(yolonc 52631	5/1/2014 8:00:00AM 5/22/2014 11:58:23AM	91:23:20	27:54:55 30.5%	22:09:18 24.2%	0:30:46 0.6%	35:09:40 38.5%	05:38:41 6.2%
Summary:			91:23:20	27:54:55 30.5%	22:09:18 24.2%	0:30:46 0.6%	35:09:40 38.5%	05:38:41 6.2%
Grand Total:			1,077:28:41	516:09:21	248:33:44	05:33:14	257:11:00	50:01:22
				47.9%	23.1%	0.5%	23.9%	4.6%

This report might not include complete data for calls received after 5/22/2014 8:06:31AM

CSQ - Agent Summary Report

5/5/2014 8:00:00 AM - 5/21/2014 6:00:00 PM

CSQ Name (ID)	Agent Name	Extension	Calls		Talk Time		Work Time		Total	Calls On Hold	Hold Time		RNA *
			Handled		Avg	Total	Avg	Total	Ring Time		Avg	Total	
	Amy Stalnaker	52632	157		0:04:11	10:58:17	0:00:56	02:28:33	0:12:56	27	0:01:15	0:34:08	51
	Ann Wilmoth	52640	291		0:04:10	20:14:01	0:00:52	04:14:09	0:21:22	94	0:01:13	01:55:06	28
	Carolyn Wiesen	52658	155		0:03:29	09:00:21	0:00:56	02:26:15	0:16:33	87	0:01:10	01:41:33	29
	Charlotte Stover	52661	2		0:05:38	0:11:16	0:00:35	0:01:10	0:00:05	1	0:03:16	0:03:16	0
	Gary Reed	52613	5		0:04:57	0:24:47	0:00:50	0:04:11	0:00:26	1	0:00:16	0:00:16	0
	Glenna Nichols	52612	177		0:05:17	15:38:02	0:00:57	02:49:46	0:18:02	98	0:02:22	03:52:57	90
	Holly Devins	52607	5		0:02:41	0:13:26	0:00:48	0:04:02	0:00:21	2	0:02:53	0:05:46	0
	Idesha Fox	52619	378		0:01:52	11:47:34	0:00:54	05:43:59	0:30:50	159	0:01:36	04:14:43	6
	Karen Gray	52674	6		0:05:20	0:32:03	0:00:59	0:05:55	0:00:29	3	0:00:56	0:02:50	0
	Lisa Conley	52623	4		0:03:33	0:14:12	0:00:56	0:03:47	0:00:15	0	0:00:00	0:00:00	1
	Margo Perkins	52615	8		0:03:47	0:30:19	0:01:00	0:08:00	0:00:46	1	0:00:26	0:00:26	3
	Nicole Simpkins	52682	316		0:02:30	13:12:53	0:00:54	04:46:33	0:32:27	76	0:02:46	03:30:34	25
	Robin Duncan	52605	139		0:03:05	07:10:36	0:00:57	02:12:21	0:13:28	71	0:04:47	05:40:45	59
	Shannon Blood	52671	251		0:06:46	28:19:24	0:00:35	02:30:20	0:17:03	56	0:04:16	03:59:47	5
	Shonda Lewis	52603	400		0:02:29	16:37:23	0:00:53	05:53:33	0:31:02	272	0:02:09	09:46:27	9
	Teresa Burdette	52610	1		0:16:55	0:16:55	0:01:00	0:01:00	0:00:01	1	0:09:47	0:09:47	0
	Yolonda Tyler	52631	302		0:04:19	21:46:40	0:00:53	04:28:47	0:26:15	161	0:02:24	06:28:34	22

This report might not include complete data for calls received after 5/21/2014 9:15:59AM

Application Performance Analysis

5/5/2014 8:00:00 AM - 5/21/2014 6:00:00 PM

* A call can invoke more than one application and is counted for each of them.

** Including calls aborted and rejected.

+ Summary values are calculated for the entire report period.

<u>Application ID</u>	<u>Application Name</u>	<u>Calls Presented*</u>	<u>Calls Handled</u>	<u>Calls Abandoned**</u>	<u>Abandon Rate (per hour)</u>	<u>Avg Call Duration</u>
0	PEIA_Main	6,274	5,269	1,008	2.55	0:02:57
6	PC_Disaster	4	0	4	0.01	0:00:10
9	PC Standard	1,905	707	1,198	3.03	0:01:10
10	TEST	5	0	5	0.01	0:00:15
12	CPRB_Main	6,553	2,652	3,899	9.87	0:02:18
14	Service_Desk_Main	5,661	4,441	1,221	3.09	0:05:22
16	ServiceDesk_App_AA	5	0	5	0.01	0:01:16
18	DMV_AA	2	0	2	0.01	0:00:09
19	DMV_Main	44,485	20,765	23,730	60.08	0:05:27
21	Tourism_Main	2,566	1,984	582	1.47	0:01:14
22	Tourism_ApplicationAA	6	0	6	0.02	0:00:26
25	BCF_CSRC_Main	12,817	4,945	7,874	19.93	0:16:59
26	BCF-ClientSvc	6,914	1,772	5,142	13.02	0:06:56
27	BCF_Agent_AA	80	37	43	0.11	0:00:35
28	DMV_CSU	2,131	1,981	150	0.38	0:09:36
29	BCSE_CustomerService	4,398	901	3,500	8.86	0:28:14
30	BCSE-EmpRelations	606	406	200	0.51	0:04:41
31	DMV_HelpDesk	5,580	5,298	282	0.71	0:02:49
32	DMV_Citations	3,338	3,093	244	0.62	0:03:00
33	DMV_CompIns	2,252	2,075	177	0.45	0:03:58
34	DMV_DUI_Violations	2,582	2,368	215	0.54	0:04:04
35	DMV_Interlock	2,435	1,804	632	1.60	0:11:01
36	DMV_DUI_Records	150	105	46	0.12	0:02:51
37	DMV_License	4,255	4,055	200	0.51	0:02:12
39	BCSE_CentralReg	38	12	26	0.07	0:08:39
40	DMV IT Helpdesk	406	356	50	0.13	0:03:08
41	PEIA_Enrollment	457	324	133	0.34	0:03:26
42	DMV_Vehicule_Service_TitleReg BCSE_App_AA	1,123	1,050	73	0.18	0:03:32
43	BCF_PromptRecord	3	0	3	0.01	0:00:06
44	TAPS	1	0	1	0.00	0:00:05
777		41	0	41	0.10	0:00:17
Summary +		117073	66400	50692	128.33	0:06:57

This report might not include complete data for calls received after 5/21/2014 7:44:32AM

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: PEI014001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|---|--|
| <input type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Company

Authorized Signature

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.
 Revised 6/8/2012