

**REQUEST FOR PROPOSALS  
CUSTOMER SERVICE CENTER  
OS/CSC-22-001-S**

**QUESTIONS AND RESPONSES #13**

**(LAST QUESTION AND RESPONSE SET)**

Question 619: When the RFP was initial released, it required a six (6) month Transition-In period. However, since the RFP release, the scope has significantly changed, and the Contractor is now responsible for the configuration and provision of phone and CRM systems. The CRM system must provide integrations with external systems and data migration from the current CRM. These tasks can require significant time to coordinate across parties and significant time for testing. Would DHS please lengthen the Transition-In period to one year in order to reduce the risk associated with these tasks.

**Response: The State cannot extend the length of the Transition-In period. The Department will endeavor to work with the vendor to ensure that system integration and data migration will be completed within the six months.**

Question 620: Amendment 12, revised answers to questions 504, 507 and 508 - This new real-time transmission requires development of real time interfaces to multiple DHS systems, and it was confirmed in answers to questions that these integrations do not exist today. Understanding that there is most likely *create, retrieve, update and delete* functionality for each of the exchanges to be built; the design, development and implementation time required will exceed the current six-month implementation required by the RFP per Section 3.1 "Contract Initiation Requirements". In addition to risks to the required schedule, because there are no details provided on how vendors will integrate with these systems, the budgets proposed are unlikely to be accurate or will be significantly inflated to cover unknown risk and other factors. We therefore make three recommendations for changes to the RFP that we believe will enable the procurement to proceed with best value proposal evaluations:

- 1) Allow Offerors to provide time and materials rates for design, development, and integration (DDI) work to be performed during the contract, as governed by the Task Order provisions in RFP Section 3.14.
- 2) Allow Offerors to propose Task Order based work to accomplish the requirements in Section 2.3.11.D, as well as any other relevant requirements that are associated with integration with State systems (CSMS, CJAMS, E&E, etc.).
- 3) Clarify that the integration requirement stated in Section 2.3.11.D is not required to be completed for all identified systems within the 6-month implementation period defined in Section 3.1, and instead allow for a phased approach.

**Response: The State cannot extend the length of the Transition-In period. Integration with our systems and data migration are requirements by the end of Transition-In and cannot be transferred to work orders. However, the Department will endeavor to work with the vendor to ensure that system integration and data migration will be completed within the six months. Clarification on Section 2.3.11 will be responded to below.**

Question 621: Amendment 12 Since the plan is for Oral Presentations to happen shortly after proposals are submitted, can you provide more details about your expectations for the CRM/IVRS/ACD demonstration? For example, would you expect to see demonstration of a scenario that is relevant to health and human services program customer service?

**Response: DHS would like to see a system demonstration including the full life cycle of a call through the IVRS, ACD, CRM and also the reports and dashboards.**

Question 622: Amendment 11 and 12 - The following is an update to a previously submitted question, which we felt should be included with our post-Amendment 12 questions. The modified requirement in Amendments 11 and 12 are material changes that will impact the level of effort and solution required for the CRM. As such, we would like to request a three-week extension of the due date, to 10/27/23.

**Response: Requests for extensions are denied. The Proposal Due Date remains October 6, 2023 at 5:00 PM. The Department intends to post responses to the remaining substantive questions until Friday, September 29, 2023.**

Question 623: Could DHS provide additional information on the systems we must integrate with for both the IVRS and CRM - we understand there are no APIs but do all systems support webservice? If no, could DHS please tell us what they support by system?

**Response: All DHS Systems are integration compatible with both APIs and web services.**

Question 624: Could DHS tell us of the 3,200 users of the CRM system what would be the maximum number of users on the system at the same time?

**Response: All users are expected to be concurrent users accessing the system.**

Question 625: Can DHS clarify why the volume in the pricing form attachment B was changed to 175,000 monthly contacts, when historicals for 2022 reflect much lower?

**Response: The 175,000 refers to monthly inbound calls forwarded to an agent. The reason there was a change was because this number is reflective of our more recent statistics in 2023.**

Question 626: Can DHS confirm if you would like vendors to model staffing to the 175,000 monthly contacts as provided in the pricing sheet, or utilize the provided historical data?

**Response: Please use the Price Sheet for the staffing model. While the State can never guarantee our estimates or what will actually happen, the Price Sheet contains our expectations for the Contract.**

Question 627: Will desktops be provided by the government this contract?

**Response: Desktops will not be provided to the Contractor.**

Question 628: *Question 601: Section 2.3.6 - Please confirm the CSC will receive and process inbound mail correspondence? Is the Contractor responsible for imaging and keying in documents received via USPS? Response: Yes.*

This answer is the first indication that imaging and data entry of documents received via USPS will be part of the scope.

Question: Will vendors have access to the DHS imaging solution to process mail correspondence?

Question: Will DHS be responsible for providing access to a document repository solution?

Follow-up Request: If the answer is no to either question, please define the integration requirements for the vendor to supply images to DHS and other requirements that are necessary to scope a solution for document imaging, storage, and retrieval, similar to the requirements provided for IVR, ACD, and CRM.

**Response: The answer to Question 601 is no. The vendor does not need access to our DHS imaging solution because the vendor will not be processing paper mail.**

Question 629: Section 2.3.11.D - Please define the web-based correspondence workflow. When will it be used? Please provide an example of when/how DHS anticipates this workflow would be applied.

**Response: The Contractor shall provision a email inbox to receive and respond to web inquiries from the DHS webpage (myDHR).**

Question 630: Section 2.3.11.D Technical Operational Requirements - Does this requirement refer to inbound secure message functionality?

**Response: The Contractor shall provision a email inbox to receive and respond to web inquiries from the DHS webpage (myDHR).**

Question 631: Section 2.3.11.D Technical Operational Requirements - Is the web-based correspondence workflow currently in-place?

**Response: Yes.**

Question 632: Section 2.3.11.D Technical Operational Requirements - If the web-based correspondence workflow is currently in place, please provide the volumes of inbound inquiries through the web-based workflow.

**Response: Refer to Appendix 8.**

Question 633: Section 2.3.11. - C. Purchase, install, and maintain a dedicated data circuit (minimum of 20 mbps) to terminate from the Contractor's location to DHS's Primary Data Center (SSC Primary). As a backup, install a dedicated data circuit (minimum of 20 mbps) to terminate from the Contractor's location to Department of Human Services Information Service (DHSIS). This second circuit (from DHRIS) should terminate to a secondary vendor location. Should this location change the Contractor will be responsible for costs associated with moving the circuit. - Can the vendor provide access to DHS over a secure VPN tunnel from two redundant locations rather than dedicated circuits?

If vendors do have to provide dedicated circuits do vendors also have to provide the hardware these circuits will terminate on in the two DHS data centers?

**Response: Please see Amendment 14.**

Question 634: Attachment D Attachment D, Part 3, Section B, in cross referencing Item 8 in part 1, the current options to choose from are 1) Supplier, wholesaler, and/or regular dealer 2) Manufacturer 3) Broker and 4) Furnish and Install and other Services. All these categories seem to be in applicable for a Service provider. How would you recommend us to categorize a Supplier that only provides Services.

**Response: Please use item #4.**

Question 635: Section 2.3.6 - Please confirm that any document imaging is performed in the State's ECMS solution.

**Response: The Contractor does not currently use our ECMS system.**

Question 636: Appendix 8 - Do the Email and Fax volume numbers reflect inbound volumes, outbound volumes, or both? If the volumes reflect the total of both inbound and outbound, please provide the volumes broken down as follows, so we may provide an accurate cost model:

Inbound Email Volume

Outbound Email Volume

Inbound Fax Volume

Outbound Fax Volume

**Response: Email and Fax volume are inbound. The mail volume are when the contractor has fulfilled a document request.**

Question 636: Does opt into receiving an SMS already exist?

**Response: Yes.**

Question 637: Is there any existing automation in production for Front and Back office operation work? Will this be transferred over to the new Contractor?

**Response: The Department does not expect any existing automation to be transferred to the new Contractor.**

Question 638: Is there a resident/citizen portal as active interaction channel for CSC operation?

**Response: No.**

Question 639: Is there any existing IT Governance framework for project prioritization, approval, review and communication purposes?

**Response: Please see Section 2.3.16.**

Question 640: Section 2.3.5: Item 5: How are facsimiles, postal mail, and electronic mail received by the CSR? How are written inquiries received?

**Response: Contractor will not receive postal mail. Currently, the vendor has a fulfillment team that handles fax and electronic mail. Offerors will need to propose how this requirement will be met.**

Question 641: Section 2.3.7 – emails: How are emails received and responded to? What State systems are used? Does each CSR have their own State provided email address and extension?

1. Item C: How does the contractor generate this mail on the State's system?

**Response: Emails are received through the myDHR website.**

Question 642: Is the facility where postal mail/document fulfillment tasks are completed required to be located within the State of Maryland?

**Response: Please refer to Section 2.3.7.C. All mail containing PII must be handled in the Maryland facility.**

Question 643: Section 2.6.9 number 10 under Quality states the IVRS is required to resolve more than 75% of incoming customer calls. Does this mean an automated system must be answering 75% of incoming calls so they do not reach a live agent? If so would that mean we should estimate 25% of the calls showing in Appendix 4. DHS Customer Service Center Volume Historical Data Sample should end up being live agent calls, or does Appendix 4 show the live agent call volume (after the IVR handles

75%)? To add to this, the Financial Proposal is estimating 130,000 inbound calls per month. Is this before or after the IVR handles 75%?

**Response: Appendix 4 and the Price Sheet reflect calls handled or transferred to agents.**

Question 644: Do the Contractor's agents only enter information that requires updating from Tier 2 calls or can agents directly enter the call notes/call dispositions/call codes?

**Response: Agents will need to use the CRM to enter in case information and notes for all calls.**

Question 645: What is the minimum simultaneous inbound call capacity?

**Response: This information is not readily available.**

Question 646: How long will you require us to store call recordings? Our default is 90 days.

**Response: The Contractor shall comply with the requirements for record retention in Attachment M.**

Question 647: Please provide requirements for the "chatbot" mentioned in Attachment B Financial Proposal.

**Response: The State cannot provide requirements at this time. If the State decides to proceed with this service, we will inform the Contractor. The State is only asking for the monthly cost at this time.**

Question 648: Transformation - What are the digital channels available for self-service? Public and/or self-service portal? What technologies are they leveraging?

**Response: Currently, we do not have any digital self-service channels except IVR.**

Question 649: Transformation - What is the usage volume to MD DHS public website home page? Measure by unique visitors and total visits

**Response: This information is not readily available.**

Question 650: Transformation - What is the usage volume of the MD DHS self-service portal? Measure by account holders, unique visitors, total visits

**Response: There is no self-service portal.**

Question 651: Transformation - What is the structure of the MD DHS public website in terms of number of pages, and how deep page levels go?

**Response: This information is not readily available.**

Question 652: Transformation - What is the total population size for each program - SNAP, TANF, Medicaid, and Child Care?

**Response: This information is not readily available.**

Question 653: Transformation - What is your Spanish speaking count / % of customers?

**Response: This information is not readily available.**

Question 654: Transformation - What is the existing IVR containment %?

**Response: Nearly 50%.**

Question 655: Section 2.3.2 (D, E, F) & Section 2.3.4 ( Point C, D, E) Are the IVRS features highlighted in the RFP already live or would they require new development work ? (eg automated Customer Satisfaction surveys, Selfservice, ability to get case information through the IVR)

**Response: Per Amendment 5, this is a new development.**



Question 656: Could DHS tell us if there are agents and call center activity at 311 W Saratoga Street in Baltimore?

**Response: There are no call center agents at DHS.**

Question 657: Postal Mail Document Fulfillment Could DHS tell us the percentage of mail that has no PII associated with it?

**Response: The Contractor will not receive postal mail.**

Question 658: Training - What format would the training provided initially by DHS take (PPT, facilitator guides, digital courses, webinars, assessments, etc.)?

**Response: DHS will provide training materials during Transition-In.**

Question 659: Can you please elaborate on what is meant by "resolved" regarding the following language in the RFP: IVRS is required to resolve more than 75% of the incoming customer calls?

**Response: Customer gets the required information and therefore the call does not get served further to an agent from the IVR.**

Question 660: What data sources need to be connected in order to accomplish the 75% of calls resolved by the IVRS?

**Response: DHS applications-related data from CSMS, E&E and CJAMS.**

Question 661: Section 2.2 Background Can the Contractor respond to email inquiries through the IVRS?

**Response: No.**

Question 662: Section 2.2. Background Can the Contractor responds to faxes through the IVRS?

**Response: No.**

Question 663: Section 2.3.2 IVRS - How many calls per month are currently serviced by the IVRS without the caller interacting with a live agent?

**Response: Current IVR serves at 50% containment.**

Question 664: Section 2.3.2 IVRS - Is DHS or the Contractor responsible for determining the self-service functionality available through the IVRS?

**Response: The Contractor.**

Question 665: Section 2.3.2 IVRS - Is DHS or the Contractor responsible for programming the self-service functionality?

**Response: The Contractor.**

Question 666: Section 2.3.4 ACD - Are any DHS employees using the ACD? If so, how many and what are the Contractors' responsibilities for these staff?

**Response: DHS does not need to use the ACD.**

Question 667: Section 2.3.7 Postal Mail/Doc Fulfillment - Please describe any responsibilities the Contractor will have related to inbound mail/document processing.

**Response: The Contractor will not receive mail, but will receive fax verification requests.**

Question 668: Appendix 4 Historical Data - Does DHS anticipate the Contractor will need to process a backlog of any outstanding work at the start of the contract? If so, please estimate the size of the anticipated backlog.

**Response: No backlog is anticipated. All open work orders will continue to be worked upon by the respective assignee.**

Question 669: Section 2.3.18.1-A 1) Please define the users the vendor will be supporting.

2) If the end users include State users, please define the total number of State users to be supported.

Who provides the initial end-user support for Tier 1 calls?

**Response: It is anticipated there will be 3200 DHS users.**

Question 670: Will DHS please provide the number of inquiries or problems received by the DHS CRM Helpdesk for a specific period of time, encompassing all channels including calls, emails, and other communication methods?

**Response: DHS is not able to provide this information.**

Question 671: To understand the after-hours support needs, will DHS please provide the number of problems or emergencies that have been received after normal business hours and have required technical support during those extended hours for a specific period of time?

**Response: DHS is not able to provide this information.**

Question 672: Will DHS please clarify whether postal mail and faxes are received at a DHS facility or at the Contractor's site? If received at a DHS facility, will DHS please provide details about the facility location and the procedure by which the Contractor will obtain and process these items?

**Response: Currently the faxes are received at the Contractor site. The Contractor will need to respond accordingly. There is no postal mail.**

Question 673: In the event that faxes are currently being received at a physical location, will DHS please confirm if the Department would be receptive to exploring the possibility of transitioning to an online cloud-based option for receiving and processing faxes?

**Response: The Offeror can propose how the requirement will be met.**

Question 674: Section 5.3.2.F.14 To ensure compliance with the reporting guidelines outlined in the RFP, could DHS provide clarification on whether open-source software utilized by the contractor for internal operational purposes, such as staff management, need to be reported as per the requirements specified in RFP section 5.3.2.F.14 on page 82?

**Response: Yes.**