

RFB ETI0030 APPOINTMENT SCHEDULING SOFTWARE – VENDOR Q&A

November 3, 2018

No.	RFB SECTION	RFB PAGE	QUESTION	ANSWER
Q1			Whether companies from Outside USA can apply for this? (like, from India or Canada)	Yes, but ETF’s data must reside in the continental United States only. See requirement 175 in Form B – Requirements, page 11.
Q2			Whether we need to come over there for meetings?	Yes. ETF will need an in-person demo of the software, and onsite in-person implementation support. All State of Wisconsin vendors need to meet the State of Wisconsin’s security and technical requirements, no matter where they are located.
Q3			Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)	ETF will need an in-person demo of the software, and onsite in-person implementation support. All State of Wisconsin vendors need to meet the State of Wisconsin’s security and technical requirements, no matter where they are located.
Q4			Can we submit the proposals via email?	No. Bids must be submitted via mail only.
Q5			Can you give us an idea of how many staff members will have scheduled meetings with clients?	30 staff currently meet with members. This is subject to change with staffing levels.

RFB ETI0030 APPOINTMENT SCHEDULING SOFTWARE – VENDOR Q&A

No.	RFB SECTION	RFB PAGE	QUESTION	ANSWER
Q6	Form E Cost Worksheet	56	When providing pricing for our annual Software-as-a-Service platform we license and determine price based on the number of locations (offices, branches) as well as the number of resources (WI staff that will handle the appointments that members scheduled, i.e. a bookable asset/appointment host). It is unclear in reading through the RFB how many licensed resources are required in addition to the number of locations (i.e. unique office buildings etc.) that need to be licensed and we are requesting clarity here?	<p>The number of staff doing appointments are approximately 30. This number could change with staffing levels.</p> <p>ETF hosts appointments at about 40 different locations. These are not our branches but locations around Wisconsin. These do change from time to time and are subject to change with demand.</p>
Q7	Table 3 under Section 1.8 Calendar of Events	7	Is it possible to extend the Bid Due date by 1 additional week so that it will be due November 19, 2018 at 2PM CST?	No
Q8			What is the scope of product training expected? Will it be in-person or web-based training? How many users will need to be trained?	<p>Either web-based or in-person training is acceptable, although in-person is preferred. A minimum of three trainers and a maximum of 7 trainers should be trained. Admin users should also be trained by the vendor.</p>
Q9			What type of support are you looking for: 24x7 (7 days a week), or during working hours on weekdays (Mon-Fri)?	<p>Monday through Friday 7:00 a.m. to 5:00 p.m. Per requirements provided, we would also like to understand what support models the vendor offers.</p>

RFB ETI0030 APPOINTMENT SCHEDULING SOFTWARE – VENDOR Q&A

No.	RFB SECTION	RFB PAGE	QUESTION	ANSWER
Q10			Do you have a specific budget for the Appointment Scheduling Software? If yes, please share the allocated budget?	ETF will not be sharing a budget at this time, as it would be speculative and needs to be informed by this process.
Q11			Can we send the pricing proposal in a different format than the one provided in the RFB document? We are asking this because this will give us added flexibility to provide cost breakdowns, item-specific tiers, and optional items as a part of our proposal.	Use the Form E Cost Worksheet as-is and fill it out completely, even for costs that are N/A. State those as \$0 cost. You can add additional information after Form E as stated on Form E: <i>If the bidder believes additional pricing information would be helpful and benefit ETF in understanding the costs, provide the additional information after the Cost Worksheet.</i>
Q12			Is the preference for a SaaS solution?	No. We are open to considering both on premises and cloud-based solutions.
Q13			Please could you advise if there are any integration points other than CRM and O365?	Integration into Go-to-Meeting and Skype (RQ48) are also listed in the requirements. APIs for possible future internal system integration are also listed in the requirements. (RQ156, RQ169)
Q14			Any consideration for wider functionality/ use cases e.g. events?	We have multiple types of events at ETF, but those do not require our members or employers to sign up. We do have group appointments, but those requirements have been provided. (RQ20, RQ29, RQ33) As specified in the RFB, phase 1 will be implemented internally only, but phase 2 will include giving our members and Employers the ability to schedule appointments or be included in training.

RFB ETI0030 APPOINTMENT SCHEDULING SOFTWARE – VENDOR Q&A

No.	RFB SECTION	RFB PAGE	QUESTION	ANSWER
Q15	Form B Requirements RQ20	Page 2 of 13	<p>Admin user(s) must have the ability to set the number of members that can be scheduled in each group appointment slot.</p> <p>Please elaborate on ‘group appointment slot’? Is this a fixed time period or interval?</p>	Group appointments allow up to 12 people to schedule into the same appointment time and they are addressed in a group meeting all at the same time. (Currently it is a 2.5-hour long meeting). (RQ20, RQ29, RQ33)
Q16	Form B Requirements RQ115	Page 28 of 68	<p>Can you provide a spec sheet for the CALLSS/WEBS system and the version/installation you have? Is this integration part of the Solutions’ requirements to complete?</p>	APIs for possible future internal system integration are also listed in the requirements. (RQ156, RQ169)
Q17	Form B Requirements RQ141	Page 30 of 60	<p>Solution needs to have the ability to merge existing applicant accounts (when the same applicant has 2 or more different accounts).</p> <p>Is this associated with the initial list of accounts?</p> <p>A Quality Check prior to importing the data?</p>	ETF needs to have the ability to merge multiple accounts into one account for the person. If there is a duplicate account, ETF needs the ability to merge multiple accounts for the same person. And, yes, we do want a quality check.

RFB ETI0030 APPOINTMENT SCHEDULING SOFTWARE – VENDOR Q&A

No.	RFB SECTION	RFB PAGE	QUESTION	ANSWER
Q18	Form C - Section 28.0	Page 11 of 17	<p>Upon review of <u>Form C: 28.0 Data Security and Privacy Agreement</u>: we would need to have a few changes, especially around the prior written permission requirement. If we provide those requested changes, would you consider them?</p>	<p>Please specify all requested changes to Section 28.0, including the prior written permission requirement, on Tab 2 Assumptions and Exceptions, of your bid response. ETF is in the process of revising Section 28.0 of the Department Terms and Conditions. Consequently, it may be necessary to prepare a clarification document during contract negotiations with the successful vendor. That document will become part of the contract.</p>