

Vendor Questions and Answers

	Questions	Answers
1	Does the information that is downloaded into the system have to be in a pre-defined format?	Yes, it must be in .CSV format.
2	Even within the CSV document, does it have to be pre-defined?	Yes, it has to be exact. Your categories must be exact and have no transaction errors. You'd have to fix each individual transaction. It's easier to fix the wrong category on the spreadsheet because you can do find and replace. If attempting to fix in CAMPER you'd have to fix each individual transaction.
3	How often do you get calls that the user can't enter a transaction into the CAMPER System	Daily. Probably half a dozen calls on a daily basis. The questions can be simple as: I can't remember my username & password, I don't know how to start a report, they can't figure it out. What's happened is sometimes they don't scroll down; they don't see their reports list for some reason. They get the page open and they're like, how come it won't let me pick a new report? They don't always figure if they look a little further, they'll find the one with open status. Some conservators are pretty limited in terms of using their computer.
4	You mentioned in the write-up (RFP) that a number of the conservators represent multiple people. Can you give an idea how many of the users are handling multiple clients and how many are single?	I don't know if we have specific information, but we have approximately 4,000 conservator users and over 600 have more than one case.
5	1)The deficiencies of CAMPER, in terms of what you're up to today, are they on the issues list? Or are these things we're going to expose? 2)Can you specify the shortcomings of the current system CAMPER that the future state should address?	They are on the issues list and in the requirements document. The issues document is provided on the website.
6	In the use case, you're talking about the administrator being able to maintain the help contacts. Does that mean we'll have fixed areas where they'll need text and we'll add that or will it have to be dynamically able to maintain	We would like it maintained within the system with some flexibility so if we get multiple calls on a specific area we can add a help feature in this area.

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7	: Is M-N-C-I-S a product or is it a custom-built app?	It's a product called Odyssey. Tyler Technologies is the vendor for that system. (MNCIS is the case management system for the Minnesota Judicial Branch)
8	So, we'd have to work with that group for integrations?	We actually have a group at the state that does the integrations that works through an integration broker.
9	So as long as we can talk with the broker, we can do it?	Yes, that's correct.
10	There was a tutorial attached to the RFP that seemed to provide the screen shots from a conservator perspective. Can you provide screen shots for the other users of the system to allow us to see how much complexity and the details needed for the other users?	Can you give details about the screen shots you want?
11	It is possible much of the screens are not covered that dealt with other interactions from people using the system, such as court users. We don't have details of those screens. So for anything that is not provided in the tutorial, is it possible to provide screen shots so we can get size and complexity of those screens and functions that are required?	Yes, I can post that on-line. The court user and administrator manuals are now posted and have screen shots of the screens seen by these users.
12	Q: When your office users log into the system, do they have a separate security or is it integrated within the security layer you already have?	They have a separate login id and password. We have no plan to intergrate the login in with another system.
13	Did I hear you say that the business rules are going to vary a little bit from county to county so that not every county handles everything the same?	There is a CAAP Business Rules Team that is working on creating statewide best Practices. We are working hard to get consistency statewide so hopefully there will be less and less of that. Currently when you have an emergency conservator who becomes a general and they are the same person the practices vary. Because it is the same person, some counties request they file the inventory and wait a year to file the annual account. Other counties ask they file inventory and final for emergency and then start separate accounts for the general. It's more obvious for different emergency and general conservators, but not as obvious when it's the same person. The CAMPER administrator sets it up as required by that county at this time.

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14	In the requirements document, there were some swim lanes and there were items with some green boxes, if interface to MNCIS is going to be through the team and the broker, what do the green boxes look like to us? I understand that the green boxes are [within scope If I see a green box in the swim lane, should we assume that we communicate with the broker and that means the rest would be done by the integration team?	The Branch ITD will provide the necessary changes in MNCIS and will provide the vendor with the requirements that will need to be built into the OCAP system to ensure the online system will communicate through MQ or web services with MNCIS.
15	1)Regarding data migration, you got all the data, the data model might change. Have you talked about what the data migration requirements are? 2)Is data migration from CAMPER to OCAP optional or mandatory? We have considered it as mandatory as use case CS6 requires to compare the previous year filings (Pg. 39). But use case S29 sounds as though it is optional (Pg. 49).	We only have data since 2010, but given structure of current system, what we can migrate is a question that we have not answered.
16	Do you have business need to carry forward	Yes, we do have a need, but with the current system structure the question is would we just get junk?
17	What is your perception of the data quality and data cleansing requirements? If you're going to carry that forward, has your team made any assessment about the cleanliness?	The concern is the data that is there is good data, but is it attached to the party that it needs to be. Will Joe Smith's data be with Joe Smith? I think the data is clean. It's an issue of the way the data is stored. The data that is there is separate, but will the data come over with the correct name. The concern we have most is the user information and the files. Need the users, protected persons, parties - that's the critical piece needed for migration purposes and would be the cleaner data. The spreadsheet of account reports may not come across with the numbers. Maybe the ending number would carry over and be possible to maintain.
18	Would you want to see old information?	We would, but if we don't keep account numbers - dollar numbers, we can always go back and compare. It will be messy for a while, but we'd work out of it rather quickly.

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19	How is the legislative volatility of this environment? Are your business rules and processes changing because of the legislature?	I think it would be a fairly stable system once we establish it. I don't know this area has had a lot of change. Really, we've self-defined the financial information that we need to monitor. A lot of this would be under our (court) control. There may be greater regulation of conservators, but that would not change the system The auditing program is a new program and since we've come into place court staff have asked if we are going to expand into trusts so we may have other types of accounts reporting into system. The mechanism would be similar, it would just be in addition to. The other piece of that is that CAMPER is the only statewide online conservator account system nation-wide. There have been many inquiries from other states interested in what we are doing.
20	Where is this hosted right now? In OET?	It's in the judicial branch servers which is near OET (Office of Enterprise Technology) . The judicial branch has its own server.
21	Is it governed by OET?	No, the judicial branch has their own IT Department and it's controlled by the Supreme Court.
22	In the use cases you talk about sending out Outlook reminders. Are you requiring your users to have Outlook?	No, if they have an e-mail address we would like the system to send an email reminder when their account is due.
23	So the reminder is just an e-mail reminder?	Yes - the intent was e-mail. If we said Outlook in the document, the intent was e-mail.
24	In the RFP you mention state of the art technology like smart forms. What do you mean by Smart Forms?	So that if the conservator fills out that form and submits it, we don't have to re-key that information right there. Where it talks about the name of that case, the address, it would just automatically populate. Each item that's a data element <u>would populate.</u>
25	And then send that information to MNCIS?	Yes, the state is currently doing some work with Life Cycle. I'm not sure if that's the same system

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26	Is there a business reason behind your June 30, 2013 deadline	We have a grant from SJI with a deadline and it is the end of state biennium. We are more likely to have extra money at end of biennium so would have greater flexibility
27	Has funding for project been identified and authorized ? What is the development budget for the proposed solution?	Yes, but until we get bids we don't know how much. We have a definite commitment to proceed, but until we get bids, we don't know how we much need.
28	In RFP - administrators creating tutorials in flash. Are you looking for us to create the tutorials?	This would be a joint effort between court staff and vendor. We don't have all the resources but we have the knowledge based on experience with conservators for the content.
29	You mention "allow upload capability from any...spreadsheet." Is that similar to what you have now, so long as it's in your defined format? Or are you looking to have them export from Quicken file or a Peachtree file or something similar. You mention allowing uploading from any accounting or spreadsheet. Similar to now, if in your defined format, you want uploads or are looking to have anyone upload from various accounting packages?	We would like more flexibility but we do have specific categories that we need to stick with. We are looking for more flexibility than just .csv file.
30	Other fairly common systems?	There was one a professional conservator who was going to use Great Plains software.
31	Are you comfortable with saying only two or three rather than "any" or the price tag goes up exponentially?	We recognize that how much flexibility the system has is going to be dictated by the price tag. The current process to upload at this point seems very cumbersome and I don't know if there's any way to simplify it. We want more flexibility if we can get it.
32	1) The ability to download information from banks, are you thinking similar to Quicken or Mint, where conservators can enter log-in information so they can just pull those in? 2) The proposed solution (requirements) considers that the users will perform the uploads / downloads from Accounting Software and Banks and the system works with the data. Why there is no automation considered in this area? (with system directly interfacing with these systems to pull the data)	Yes, one of the issues is we don't want full account information. We want redacted acct numbers.

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33	If a protected person has an account the conservator manages, if you pull it - there will be a security authorization from bank. Your proxy from them, you'll get all data so typically there is no restrictive, So that isn't a function of this system?When the conservator comes into the new system, they would get everything. So we could just mask it?	We (the court) do not want the ability to pull it from the bank. We want the ability to restrict the full account number by masking it.
37	Besides the reports we saw, are there other reports in the system?	Just the report queue report
38	So what you see on the web page is what you call reports?	Yes, in the current system
39	What is your definition of ad hoc reports, your users ability to pull any data on the fly any time they want, or are they going to cherry-pick and they're going to get it?	The reporting we're talking about is from an administrative perspective. It would be predetermined reports. One of the things we want to know, at any point in time, would be the ending balance of all the accounts the court is responsible for. If we're reporting to the judicial council and someone asks, what is the total value of investment funds that are under conservatorship, I want to be able to either go in there and pull a report or have someone query the data base. We want both pre-determined reports and new reports or queries.
40	Do you want your people to have ability to pull report on fly or go through IT?	Depends on what we can afford.
41	If someone who can pull ad hoc reporting, would it be someone capable in Excel	Yes
42	Do you have SQL Report Builder?	Yes, we have SSRS for MNCIS ad hoc reports that are currently being done at the state level, but not through MNCIS.
43	As far as testing is concerned, what level of testing does your staff want to be involved in?	We want to be able to do anything to break it. We plan to do extensive testing. Both in the metro and outstate Minnesota.

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44	Considering your user base, what is the concurrency. How many people hit the system at any given time. Is there a need to perform load tests?	Reports are not due at specific point and time. Every conservator has their own timeframe; however, many work on the system at the end of the month. I don't think we know of any spikes or issues. Limitation is more with users, especially if they have dial up. We have not heard of capacity issues. CAMPER works well with Internet Explorer. Doesn't do as well with some of the other browsers.
45	Have you done any assessment, have you asked what web browsers they're using?	We haven't evaluated that, but know there are Firefox users. Users need to be able to use different browsers- as that has caused some issues.
46	ADA requirements?	There are some specific requirements through the state website referred to in the RFP. Must follow <u>Web Content Accessibility Guidelines 2.0 (WCAG)</u>
47	Is there a preference for technology platform? For maintaining with court resources?	Sequel server and ISS. RFO specified bb .net.
48	Is that the same technology for the broker?	For integration web services or MQ is used.
49	1) Any information you can provide as to MNCIS integration would be helpful. 2) Please provide any documentation around MNCIS integration.	Web Services or MQ will be used to integrate with MNCIS. The vendor will work with the Branch ITD to determine the specifications for the integration based on the business requirements. The vendor will build the new system based on those technical requirements.
50	DO you envision any travel outside the metro?	No, unless you consider our offices outside the metro.
51	Users who perform the tests, will be from this office or where?	We'll probably pull from around the state. We usually ask about 20 people to enter information and provide feedback. If we do a load test, we'll broaden it up quite a bit.
52	The expectation is to have the software operational by June 30th, then you're planning a five month roll out, transitioning to the new system? The estimated time of the deployment is five months; I'm assuming that's starting July 1. From then to end of year, transitioning to new system?	We can do more acceptance testing after June 30th. Hypothetically that additional testing would have to be done by mid-august. Rollout would have to be done by December.

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53	Everything is due by the ninth of November? Is there any way you can get us information prior to that? That leaves us with little time to include into the proposal. They become vital to our proposal so if there is anything you can do to get those screenshots to us sooner, it would be helpful.	I don't have any problem with getting that posted as soon as we can after this meeting, along with the questions.
54	Responses are due 11/9, when can we expect a decision or a communication as to where you are at or where we are in the process?	We have the date of 11/14 set aside to review proposals. I'm not sure if we have to review with legal. Our intent is to review with tech by the end of the day that day. It's possible we may have to break out options. This is a high priority and we need to turn it around quickly.
55	Do you have a demo version of this as we go forward	Just the tutorial.
56	Can you please also share the list of vendors and names of the representatives who were in the meeting yesterday?	J. Asselstine-Avtex, S.Santaprakash- Technosoft, Dustin Locander-CIT, Brian Olson, Ryan McCabe-Intertech, Tom Helvick- Intertech, Dawn Kuzma- Macro Group
57	The online CAMPER tutorial covers only the conservator facing functionality.	The CAMPER system has no other functionality outside of providing a system to file financial reports for conservators.
58	Is there any other existing system that supports the other OCAP functionality?	It is a standalone system.
59	Why do you want to rewrite CAMPER and not reuse CAMPER (with OCAP interfacing with it)?	Refer to the issues document
60	There are Green boxes mentioned under MNCIS. Please confirm that all enhancements required on MNCIS/other systems are outside the scope of this RFP.	Changes to MNCIS are not within the scope of this project however, integration with MNCIS is within the scope.
61	"ADM10. Administrator can create an administrative inventory for a historical record".	If there is an historical inventory that is on paper or in CAMPER and has not been transferred to the new system the Admin can create the inventory in order to get the information into the new system.
62	<u>Questions on ad hoc reporting capability options:</u> Can users use the SSRS report builder for adhoc reporting capability (Note: this is not a web based option)?	1) No, we need a license-free web solution for our users.
63	SSRS "Power View" feature requires SharePoint installation and hence the license. Can we propose to use this feature?	1) No, no we need a license-free web solution for users.
64	Can we propose custom build for web based adhoc reporting?	Yes
65	What is the technology stack and database used in CAMPER?	ASP and Access

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66	Based on the workflow requirements specified in the RFP, we consider using Windows Workflow Foundation in the proposed solution and not the BizTalk Server. Please confirm if this is fine.	WWF or SharePoint WF would be fine.
67	We have scheduled programs in this solution (which does not require user intervention) and we are considering the use of Windows Services to accomplish them. Is there any Distributed Product Management (DPM) or Scheduler software that we need to integrate?	We use standard windows job scheduling software
68	What is the technology stack and database used in MNCIS?	SQL Server, IIS
69	Can you share the enterprise architecture and technology standards and guidelines that the vendor should adhere to?	.NET, SQL Server
70	What is the maintenance budget (annual costs factored) for the proposed solution?	To be maintained by the Judicial Branch IT staff
71	Who is the incumbent vendor for CAMPER and is this vendor allowed to bid for this RFP?	Digital Array was the vendor for CAMPER. They are not restricted from bidding on this RFP
72	Who is the vendor who prepared the system requirements for this RFP and is this vendor allowed to bid for this RFP?	Avtex prepared the system requirements and they are not restricted from bidding on this RFP
73	In order to offer a more competitive price, can we propose to locate some of the team members from our offshore facility located outside the US. I am aware that State of MN does allow offshore project execution – hence the question.	This contract does not prohibit project team members from being located in a remote site (whether that site is located outside Minnesota or even offshore) so long as Project Management can insure liaison and interaction with the Minnesota courts team based upon Minnesota needs and times.
74	Last Paragraph on Page 10 asks about the vendors security measures and chain of custody procedures for state records related to digital imaging services. Is this relevant to this project? If so, please describe what sensitive data may be provided to the successful vendor?	The vendor may have access to conservator files possibly containing financial data.
75	Proposal Format – should we include the cost estimates as a part of the main proposal or due they need to be included in a separate (seal) envelope?	Part of the main Proposal
76	Any clarification we want to get around Quicken, QuickBooks, Peachtree, Dynamics (formerly Great Plains) account packages??	Users may use these software packages to manage their annual accounts. Conservators should be able to download the data they have in any of these systems into the online system to report their annual account with minimal manipulation.

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77	Does the application need to run within the MN Courts website?	Not within the website but if will need to be a web based separate application with a link to the application on the court website.
78	C23 and S19: Does that state or Courts have restrictions around self-registration of users? Also, are there any policies around usernames/passwords? Do these policies need to be configurable in the system? Do the other users of the system follow the same policies?	It is not a self registration system and therefore this is irrelevant.
79	Is there a SMTP server the Courts currently use and would be available to this project for both preproduction and production usage?	One would be available if required
80	What are the retention requirements on uploaded documents? Is the need to keep the actual document or just the data within it? The exception would be signatures.	Permanent, within the MNCIS file. Once the court accepts the report it is filed and stored in MNCIS.
81	S15: Permissions for the role are managed at the role level by the administrator. Is the authorization of the application supposed to be fully configurable at the site level?	
82	ADM14: What is the extent of the rules to flag something as red or auditable?	The rules would be developed and changed as data is gathered through audits conducted.
83	ADM19: does the help text need to be within the application or another program?	Depending on which option provides the simplest management.
84	O6: Oversight reviews performance management and case management section of the RFP shows several reports, are there any requirements to make these printable?	Yes
85	How is time tracked per audit? Are there any provisions the application needs to have to accommodate time tracking?	Time would be entered by the auditor and the data should be retrievable.
86	S4: are there any policies/standards regarding secure data that the system needs to comply to in the database versus on the screen?	No
87	S14: Are all the push to MNCIS requirements currently available in Production?	There are similar requirements available but the current Program does not Integrate with MNCIS so this will need to be built.
88	S15: Is the Electronic Court Forms (ECF) standard published, if so please provide?	http://www.ncsc.org/services-and-experts/technology-tools/court-specific-standards.aspx We require ECF 4.0
89	S15: Besides IE supporting version 8 and greater, are there other browser versions that are minimum standard to be supported?	Browser Chrome version as of September 1, 2012 or later, IE 8+, Safari - tested on an iPad version as of September 1, 2012 or later, Foxfire 16.0.2

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90	What is the minimum required screen resolution that we should be targeting?	Screen resolution is irrelevant but system should be designed to 960 pixels wide.