

User Experience Specialist Services

The NYS Workers Compensation Board (WCB) intends to procure User Experience Specialist services for its Business Process Re-engineering project pursuant to its discretionary purchasing authority under State Finance Law §163(6). This procurement opportunity is limited to businesses certified pursuant to Article 15-A of the New York State Executive Law.

Interested bidders should email wcbcontracts@wcb.ny.gov for additional information and to receive any future communications about this procurement.

Scope of Work

Workers Compensation Board is undertaking a series of projects under the umbrella of a BPR program. Much of the focus of these projects will be to build an impressive, seamless experience across device types and interaction models for system participants—from the injured workers, to attorneys, to employers, to medical providers, through to insurance carriers. One aspect of this initiative will be self-service portals for stakeholders. It is to leverage user-centered design principles and methodologies to inform the overall customer experience and system design. It is also to be designed in a modular manner allowing for reuse of wireframes, visual designs, etc. for similar components and interactions both within this project and beyond.

Tasks, Activities, Deliverables

The scope of this effort is the WCB Stakeholder Self-Service Portal, which includes the development of a customer-facing website that will include, but not be limited to the following User Experience, tasks, activities and deliverables:

TASK	ACTIVITIES/DELIVERABLES
DISCOVERY	<ul style="list-style-type: none">• Customer/User Research<ul style="list-style-type: none">○ Interview project stakeholders to gain an understanding of business and customer needs○ Conduct customer research through industry standard quantitative and qualitative methods• Persona Creation<ul style="list-style-type: none">○ Develop personas that can give human-centric grounding to all design and development decisions• Journey Mapping<ul style="list-style-type: none">○ Relate personas and user stories to pre-existing journey mapping artifacts○ Create new journey/experience maps as necessary• Conduct research into design patterns and industry best practice sites with similar interactions to serve as reference during the design phase

DESIGN	<ul style="list-style-type: none"> • Content Strategy <ul style="list-style-type: none"> ○ Develop information architecture to organize static content ○ Design Navigation for static content • Develop user stories (based on personas and journey maps) to guide design/development • Wireframing / Storyboarding <ul style="list-style-type: none"> ○ Create interactive wireframes so that User Interface (UI) and interaction design can be validated by both stakeholders and usability testing before investment is made in visual design or programming activities ○ Create annotated final wireframes to fully document user interfaces and interactions to guide development ○ Batch wireframes for reviewers • User Testing (Usability Testing) <ul style="list-style-type: none"> ○ Conduct user testing periodically beginning at the wireframing stage • Visual Designs <ul style="list-style-type: none"> ○ Create visual designs/mockups of screens ○ Design visual mockups in a modular/template/extensible manner so that visual templates and sections can be applied to cover all wireframe (or non-wireframed) instances ○ Batch visual designs for reviewers ○ Visual designs will be designed within the constraints of the NYS Brand and Web Style guidelines. • All artifacts created during the duration of the project should be compiled and delivered to both the ITS project manager and the ITS Experience Design Team at the end of the engagement. All source files should also be included (e.g. Photoshop, Illustrator, wireframe source files, etc.). • All design must meet NYS accessibility guideline requirements
DEVELOPMENT	<ul style="list-style-type: none"> • Provide support and consultation as necessary during development • Revisit discovery and design as necessary to solve challenges encountered during development

<p>METHODOLOGY</p>	<ul style="list-style-type: none"> • Adaptive Planning <ul style="list-style-type: none"> ○ The initial project plan and UX resource allocation should be reviewed periodically and adjusted based on research and user testing results ○ If research and usability testing show the need to focus on iteration of certain features outside of the periodic review, the need should be raised immediately. • ITS Experience Design Team Coordination – Methodology, toolset and project plan should be coordinated with the ITS Experience Design Team: <ul style="list-style-type: none"> ○ At the beginning of the project – to ensure global/enterprise alignment ○ At completion of each major phase ○ At the completion of the project – to provide retrospective feedback
<p>TECHNOLOGY</p>	<ul style="list-style-type: none"> • The User Experience will be designed to work within the framework and capabilities of selected technologies. • The User Experience shall need to be able to collaborate with and be versatile with any known technology or technology constraint confronted with. <ul style="list-style-type: none"> ○ For content pages this technology includes: <ul style="list-style-type: none"> ▪ Drupal ○ For the Medical Authorization portal these technologies include: <ul style="list-style-type: none"> ▪ Siebel ▪ OPA ▪ Identity and Access Management via NY.Gov and DOH Health Commerce services

Some of the anticipated interactions that will be available to various stakeholders are to include:

- Content pages that describe Workers Compensation programs, processes, and services
- Series of questions that guide users to the appropriate set of interactions, processes, and information based on user selections
- An application process that collects information for claim processes and requests for services and payments
- User profile to save progress and expedite data entry

Specific Stakeholder interactions may include:

For Injured Workers

- Request Board Assistance
- Register for online access
- Enter claim information
- Receive alerts, confirmations, and notifications
- Locate physicians

For Business and Employers

- Register for online access
- Update injured worker's employment status
- Submit and update claims information
- Receive alerts, confirmations, and notifications
- Access calendar for information on case-related appointments

For Third-Party Administrators, Carriers, and Self-Insured Entities

- Submit and update claims information
- Dispute medical bills
- Request suspension or medication of payment
- Respond to medical treatment authorization requests
- Access case files to view and manage claims and billing information
- Receive notifications of decisions and awards

For Medical Providers

- Register for online access
- Apply for authorization to treat injured workers
- Submit treatment variance and authorization requests
- Receive treatment authorizations
- Receive alerts, confirmations, and notifications

For Attorneys

- Register for online access
- Manage filing and claims information on behalf of the injured worker or carrier, TPA, or Self-Insured Employer
- Receive notifications of decisions and awards

Proposal

A. Technical

Please provide a description of your firm and the proposed staff highlighting prior experience and qualifications to provide the scope of services listed above. Include staff's resume and a list of three professional references.

B. Cost

Please provide the hourly billing rate for the proposed professional. The hourly rates shall be inclusive of personnel, travel, computer charges, postage, parking and all other expenses related to provision of the services.

C. Other – Additional Considerations

Please complete and include in your proposal the attached Procurement Lobbying Form.

Minority Owned Sub-Contracting Goal: 11%

Women Owned Sub-Contracting Goal: 19%

Disadvantaged Owned Sub-Contracting Goal: 0%

Due date: 06/16/2015 @12:00 PM (est)

Contract term: One year

County(ies): Albany, Schenectady

Location: Services can be completed remotely, with regular status meetings to be held in Albany, NY; Menands, NY; or Schenectady, NY

Contract and Deliverables Timeline

The contract term is expected to be for one year, with completion of the deliverables above for the Medical Authorization function executed during the first three months. The remaining major deliverables for other stakeholder processes will be completed during the remaining contract period, in alignment with WCB's roadmap.

Services can be completed remotely, with regular status meetings to be held in Menands, NY, Albany, NY or Schenectady, NY.

It is anticipated that a contract will be awarded in response to this Solicitation based on the following schedule:

Date	Event
Friday, May 22, 2015	Issuance of Solicitation
Friday, June 5, 2015 at 2:00pm (est)	Bidder Inquiries Due
Tuesday, June 16, 2015 at 12:00pm (est)	Proposal Submission Deadline
Tuesday, July 21, 2015 (estimated)	Anticipated Contract Start Date
September 15, 2015	Anticipated Completion of UX for Medical Authorization

Questions or requests for clarification regarding the solicitation should be submitted via email, by 2:00 P.M. ET on June 5, 2015 to wcbcontracts@wcb.ny.gov. Questions will not be accepted orally and any question received after the deadline may not be answered. The comprehensive list of questions/requests for clarifications will be sent to all Firms who have been requested this solicitation from WCB.

Restriction of Communications

Interested Bidders are prohibited from contact related to this procurement with any New York State employee other than designated personnel from the date this solicitation is issued until the contract has been approved. Violation of this provision may be grounds for immediate disqualification. See the Attachment for more information and requirements.

Under NYS Finance Law §139-j (3) and §139-j (6) (b), a contractor is restricted, in most instances, from making contacts during the procurement process with the Board, other than with the Board's Issuing Officer.

The Board's Supervisor of Contract Administration, Mary Grace Petralito, is the issuing officer and the Board's point of contact for all matters relating to this RFP and can be contacted wcbcontracts@wcb.ny.gov. Melissa Stefanko will be the alternate contact when Mary Grace Petralito is not available, and can be reached at wcbcontracts@wcb.ny.gov. If a prospective contractor does not receive a timely response from the Board's issuing officer, please contact, in writing, the Board's Office of General Counsel, 328 State St., 4th Fl. Schenectady, NY 12305-2318.