NYSIF®

New York State Insurance Fund
Procurement Unit

March 28, 2017

The following (Q&A) will serve as Amendment #2 to NYSIF's Request for Information (RFI) for Online Premium Estimator and Quoting Solutions, bid number 2017-15-INS. Material in this Amendment supersedes any contradictory material in the RFI.

All bids are due 4/5/17, by 2:00 p.m.(eastern).

Sincerely,

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Online Premium Estimator and Quoting Solution
RFI # 2017-15-INS
Amendment 2

#	Question	NYSIF Response
1	Should you move forward with a procurement, when would you like to acquire a solution?	NYSIF does not have an estimated time frame at this time.
2	From what source(s) will you seek funding, when will you submit funding requests, and when do you expect to know the outcome?	Not material to this RFI.
3	Can you provide any sort of estimated project cost or cost threshold?	Not material to this RFI.
4	Who is the internal project manager for this effort?	Not material to this RFI.
5	Who assisted the agency in developing this RFI?	Not material to this RFI.
6	Who is the incumbent vendor or what is the current process for handling estimates/quotes?	Not material to this RFI.
7	What platform is the website written on?	.NET 4.0
8	Will the agency or the vendor maintain the website?	Agency
9	Do you have SmartPhone or Tablet requirements?	Yes.
10	Are you open to a Cloud based SaaS solution?	Yes.
11	What internal NYSIF systems do we have to integrate to (e.g. Authentication, Authorization, Rating, Data warehouse etc.).	Not material to this RFI.
12	Can a prospect partially save and come back to a quote or premium estimate?	Yes, for a quote.
13	Is this solution also creating the new user account?	Yes.
14	Are you expecting email quote functionality as part of this solution?	Yes.
15	Are you expecting any dashboard / Quote conversion analysis as part of solution?	Yes.
16	Do you want to provide download quote / application ability for prospects?	No.
17	Is the validation of prior insurance part of Quote application or will it be taken care post Quote acceptance?	Quote to include questions regarding this topic.
18	Do you expect ability to import Locations / schedule information like employees with duties etc. from prospects in this application from formats like excel spreadsheets or Word documents?	No.
19	Do you expect system ability to verify information on Claims / declines / modifiers from previous years?	No.
20	When Quote application / system should mark generated quote as ‘Expired’? if it is not acted / processed to binding?	Functionality should be available. The number of days is not material to this RFI.
21	Our assumption is – you are not expecting the rate change maintenance as part of Vendor solution for estimator and this will be taken care by NYSIF internal systems. Is that correct?	Yes.
22	Are you expecting any notifications to NYSIF’s internal systems / Underwriters based on rules for Quotes?	Yes.
23	Do you want ability to upload any documents from Prospects side in Quote application?	Yes.
24	Is the online assistance / Help Chat while quote application, part of expected functionality for this solution?	No.
25	The RFI document mentions 50,000 quotes annually. Kindly share the percentage breakup of renewals and new quote?	This number only accounts for new business.
26	Do you expect our solution to auto-populate fields like address, office locations etc... with employer name provided by end-user?	No.

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#	Question	NYSIF Response
27	We are asking for information regarding a question on page 6 of "REQUESTED INFORMATION", in the "Technical" section. The question in the RFI was • Based on your products please explain the following: Does your firm have an established system integrator network? If yes, please describe. We ask for clarification regarding what you are looking for on this question.	NYSIF is looking to insure your proposed solution has the ability to integrate with other software systems.
28	Who are the users / customers? Would they include Agents, Insureds, or both? a. If both, would it be a different user experience for each with respect to the User Interface, Workflows, etc.?	Both, and yes.
29	*Vendor name redacted* solution is a full Policy administration system that handles anything from Quote to Issue to subsequent transactions. Any or all of this functionality can be leveraged. The RFI refers to estimating and quoting. Is the intent to get an initial estimate based on very little information, and then if the user wishes to continue, move on to an actual detailed quote?	Yes.
30	Is NCCI rating being used?	Primary rating is NYCIRB, NCCI is secondary.
31	Is NYSIF open to a broader solution that can be expanded to other functions beyond Rating (e.g., policy admin, billing, etc.)? Or is NYSIF looking for a best of breed solution for each key functional area?	NYSIF is open to either solution.
32	Can NYSIF send submission details in ACORD XML format? If not, what other XML format is supported by NYSIF to exchange submission Application details?	No.
33	How long the quote data should be maintained in our Cloud? Our standard is to purge the quotes after 3 years.	Your standard is sufficient.
34	Are there any specific security standards mandated by NYSIF to access the Quote service? Does NYSIF currently use any Cloud services?	Yes and yes.
35	Does NYSIF need access to the Quotes Database for any Data Analytics/Reports?	Yes.
36	Does NYSIF need Quotes data records to feed their downstream systems such as EDW? If so, does NYSIF prefer a daily data feed from *vendor name redacted* Cloud with Quotes data?	Yes.
37	Does NYSIF aspire to offer comparative quotes in future?	No.
38	Does NYSIF expecting vendors to support and maintain the Quote Service post go-live?	Software updates and technical support should be included in yearly maintenance fees.
39	Does NYSIF have parallel rating implemented in a test environment where rates can be compared between the Cloud Quote service and current NYSIF Rating system?	NYSIF does have a testing enviornment.
40	Does this proposed Quote Service account for supporting Agents?	Yes.
41	In current state, does NYSIF enable Quote & Bind as a self-service capability on the NYSIF portal? Or only Quote summary will be provided and the Policyholder is asked to call back NYSIF to proceed with Policy issuance/bind?	Not material to this RFI.
42	Does NYSIF expect any Quote Letters/Documents to be generated by the Quote Service upon successful quoting?	Yes.
43	Does NYSIF expect Quote Service to standardize/cleanse contact Address details?	Yes.
44	Is NYSIF open to leverage comprehensive Policy Administration & Underwriting application that supports submissions, Quotes, Issuance, Policy Changes, Cancellations, Rewrites and Reinstatements as opposed to just the Quote Service?	Yes.
45	What hosting options is NYSIF evaluating ? Licensed or Hosted model ?	Prefer hosted.
46	How does NYSIF currently generate estimate and quote ? Systems, processes and delivery method ?	Not material to this RFI.

#	Question	NYSIF Response
47	What is NYSIF's existing technology stack ? Operating system, database, technology - Java / .Net ?	Not material to this RFI.
48	Is NYSIF evaluating a portal solution or services that can integrate with NYSIF's existing portal ?	Either option.
49	How does NYSIF plan to leverage the quote generated by new online web based application, in case customer accepts the quote and wants to proceed with application ?	Ability to print sign and mail as well as the option to sign electronically.
50	Is there a requirement to send feed existing policy administration system?	Yes.
51	Will the application be rated in the policy administration system or will NYSIF will prefer to get the application to be rated by Online Premium Estimator and Quoting Solution ?	Either solution.
52	Which Policy Administration System does NYSIF currently use ?	Internally developed.
53	Will the application be rated in the policy administration system or will NYSIF will prefer to get the application to be rated by Online Premium Estimator and Quoting Solution ?	Either solution.
54	Do you have an end date solution architecture and/or technical diagram	Not material to this RFI.
55	Can you please some view of the current PAS system in-house	Not material to this RFI.
56	Who is the target audience for this quoting system	Potential policyholders, brokers and representatives.
57	What are the current pain points NYSIF is looking to address with the new solution?	Not material to this RFI.
58	Describe current integrations (internal and external) and future state	Not material to this RFI.
59	What mobile capabilities are expected in the solution?	Smartphone and tablet.
60	What Acord forms are submitted as part of the application process?	None.
61	Are Safety Group Plans considered "in scope" for this RFI? Are any additional safety programs included?	Yes.