

**BENZIE-LEELANAU HEALTH DEPARTMENT  
APPENDIX A – VENDOR QUESTIONNAIRE**

**UNIFIED COMMUNICATION as a SERVICE SPECIFICATIONS**

<b>UCaaS GENERAL / DESIGN</b>		<b>YES</b>	<b>NO</b>
1	You have provided a full diagram of your solution as proposed?		
2	Does your proposal include a detailed design and establish at least two paths of connectivity between the Data Center and the Health Department?		
3	If you are an integrator or reseller, explain why you chose your proposed technology from your portfolio as the best choice for the Health Department. What other options did you consider?		
<i>RESPONSE REQUIRED</i>			
4	Is your proposal a turnkey solution, which includes all elements of the solution? If not, please note sections that you cannot deliver.		
<i>RESPONSE REQUIRED if answered NO</i>			
5	Do you have at least 3 years of experience in the successful implementation of the proposed cloud-hosted UCaaS solution?		
6	Describe your organization’s security policy and procedures. Include provisions that protect confidential data from unauthorized access.		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS DESIGN</b>		<b>YES</b>	<b>NO</b>
1	Provide a brief description and discussion of the recommended system architecture. Describe connectivity and communication between its elements.		
<i>RESPONSE REQUIRED</i>			
2	Are all data centers supporting the Health Department (primary and secondary) located in the United States?		
3	Are your data centers SOC-1 compliant and can you provide documentation to support this?		
4	Are your data centers SOC-2 compliant and can you provide documentation to support this?		
5	How does your system ensure synchronization between signaling and media streams?  How will latency or other factors impact this?		
<i>RESPONSE REQUIRED</i>			

6	Does your Contact Center solution integrate with Microsoft Teams?  <i>If so, explain and include any extra costs in the Build of Materials cost sheet.</i>		
<i>RESPONSE REQUIRED if answered YES</i>			
7	Is a Session Border Controller required?		
8	Is a Session Border Controller optional?  <i>If so, what is the advantage?</i>		
<i>RESPONSE REQUIRED if answered YES</i>			
9	What ports need to be opened on the firewall to pass traffic through the ISP?		
<i>RESPONSE REQUIRED</i>			
10	List all compliance information as it relates to security (Relevant to the United State only).		
<i>RESPONSE REQUIRED</i>			
11	Does the Agent application support Single Sign-On?  If yes, which SSL options are supported?  <i>If there are extra costs associated with this, list in Build of Materials.</i>		
<i>RESPONSE REQUIRED if answered YES</i>			
12	Does your solution work with multifactor authentication (MFA)?		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS VoIP READINESS</b>		<b>YES</b>	<b>NO</b>
1	Describe your network readiness or testing process confirm that the network will support real-time VoIP and/or UCaaS traffic.  <i>If there are additional costs associated with products and/or services, list them in Build of Materials.</i>		
<i>RESPONSE</i>			
2	Do you recommend G.711 for maximum call quality?  Which CODEC(s) do you assume are used to calculate the bandwidth required?		
<i>RESPONSE REQUIRED</i>			
3	What network settings are best practices that the platform requires? (802.1p/q, Differential Services (DSCP), weighted fair queuing, Rapid Spanning Tree, VLAN pruning, device discovery, others)?		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS REQUIREMENT &amp; FEATURES</b>		<b>YES</b>	<b>NO</b>
1	Describe Unified Communications functionality available with the proposed solution. What components and software will be required to add desktop presence and collaboration?  Outline which functionality is provided in the base platform. <i>Include costs for both base and options in the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			
2	Is the in-bound name and number displayed on handsets?		
3	Is the Caller ID retained when transferring to mobile phones or other devices?		
4	Is there an ability to out-pulse both main numbers and/or individual DID numbers?		
5	Can outbound caller ID be blocked and/or overridden at the station level?		
6	Can users view a directory of names and extensions and sort by first name, last name, and other stored attributes?		
7	Can the Health Department System Admin configure phone system features without involving the vendor? Please explain in detail.  What limitations are there?		
<i>RESPONSE REQUIRED</i>			

8	Can end-users modify settings for Call Forward No Answer, Call Forward Busy, and other common call routing options?		
9	Describe the Attendant Console options and visibility into calls in progress.		
<i>RESPONSE REQUIRED</i>			
10	Can a conference call support at least four users with the base product?		
11	How are analog devices, including legacy fax machines supported by your system?  <i>If a gateway is required, add the optional cost to the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			
12	Can the administrator map a 4-digit extension to a corresponding 10-digit DID number on another system?		
13	How many numbers can be globally stored?		
<i>RESPONSE REQUIRED</i>			
14	Does your system have Find Me/Follow Me or single number reach capability?  <i>If so, describe how the works from the end-user's point of view.</i>		
<i>RESPONSE REQUIRED if answered YES</i>			
15	Can abbreviated dialing be done for all hard and soft client users?		
16	Can globally speed dials be programmed in the system that would be available to all users?		
17	Do you support click to dial from soft clients?  What digit manipulation/translations would be required?		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS ADMIN</b>		<b>YES</b>	<b>NO</b>
1	Does the system administration tool allow batch changes to be made to several subscribers or classes of service simultaneously?		
2	Can a Remote Call Forward Activation/Deactivation and password reset from the Administration tool or from a designated manager's PC or mobile application be made?		
3	What diagnostic tools, logs, and reports are available to aid in troubleshooting call problems?		
<i>RESPONSE REQUIRED</i>			
4	Can the proposed system be monitored and reported on VoIP Call Quality MOS Scores?		
5	Provide any other information on your System Admin tool that you would like to elaborate on.		
<i>RESPONSE OPTIONAL</i>			
6	Will the System Administrator have the capability to analyze a poor-quality call or marginal call to determine the cause?		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS LICENSING</b>		<b>YES</b>	<b>NO</b>
1	How often are core system software updates related and what is the process for deployment into the production system?		
<i>RESPONSE REQUIRED</i>			
2	Do licenses need to be assigned to individuals or is there a concurrent use option available?		
3	Explain how licensing works whether your solution is based upon Microsoft Teams or isn't.		
<i>RESPONSE REQUIRED</i>			
4	What is the process for increasing licensing if expanded capacity is needed?		
<i>RESPONSE REQUIRED</i>			
5	Is there third-party software that the Health Department will need to acquire that is NOT on the Build of Materials? Explain for what specific function by the vendor.  <i>If so, list below.</i>		

<i>RESPONSE REQUIRED if answered YES</i>			
6	Describe how your solution manages primary numbers, secondary appearances, and unused numbers which are required to maintain the dial plan.		
<i>RESPONSE REQUIRED</i>			
7	Is there any additional cost to maintain non-active numbers?  <i>If yes, please include it in the Build of Materials.</i>		
8	Would the Health Department DID's have to be ported to your solution?  <i>If yes, please include Carrier Coordination Letter of Authorization costs in your implementation price in the Build of Materials.</i>		
9	Is the system administration tool capable of supporting all on-site and remote phones from a single-user interface?		
10	The Health Department does have an 800 does is that supported?		

<b>UCaaS MOBILITY</b>		<b>YES</b>	<b>NO</b>
1	Describe any functionality in which the system can simultaneously outcall to a person's cell phone and desk phone.  If so, are both simultaneous and sequential call options available?		
<i>RESPONSE REQUIRED</i>			
2	If the call is answered on the desk phone, how do you extend the call to the cell phone?		
<i>RESPONSE REQUIRED</i>			
3	Will the user see the inbound caller's Caller ID on the display of their cell phone using the APP?		
4	Can the mobile application seamlessly move between Wi-Fi and cellular data (4G or greater)?		
5	Can the mobile application present any call quality indicators to the user?		
6	Will outbound calls from the mobile APP show the outbound DID of the dialer, and not the subscriber number of the cell phone?  Can this be blocked by the user?		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS VOICE MAIL</b>		<b>YES</b>	<b>NO</b>
1	Provide a description of your Unified Messaging offering, including message queueing and storage.		
<i>RESPONSE REQUIRED</i>			
2	Is there a voice mail to Exchange (Outlook) attachment feature available?		
3	Is it file attachments with bi-directional updates, so that a voice mail played in Exchange will update the message waiting for the indicator on the phone?		
4	Is there a speech-to-text option to transcribe and email voice mails?		
5	Where are voice mails stored?		
<i>RESPONSE REQUIRED</i>			
6	Are voice mails backed up and where?  Describe below: What is the retention period? How is storage priced?		
<i>RESPONSE REQUIRED</i>			
7	Is there a self-service option for voice mail password reset?		

<b>UCaaS E-911 SERVICES</b>		<b>YES</b>	<b>NO</b>
1	Michigan is an E-911 jurisdiction. How does your system manage location information and how do you ensure calls are routed to the proper Public Safety Answering Point (PSAP)?		
<i>RESPONSE REQUIRED</i>			
2	Does your system maintain compliance with Ray Baum's Act with respect to location information?		
3	Does your system maintain compliance with Kari's Act with respect to dialing?		
4	What is your recommendation for tracking remote agents' location information in E-911?		
<i>RESPONSE REQUIRED</i>			
5	Does a report worker have to update their own location information?		

<b>UCaaS INSTALLATION/IMPLEMENTATION</b>		<b>YES</b>	<b>NO</b>
1	What is your proposed local installation strategy?  If customer resources are needed for software/hardware or CPE indicate below.		
<i>RESPONSE REQUIRED</i>			

2	What is the lead time in the supply chain for the on-premises equipment in your proposal?  Are there constrained products?		
<i>RESPONSE REQUIRED</i>			
3	What is the typical implementation timeframe for a solution of this kind?		
<i>RESPONSE REQUIRED</i>			
4	What is the proposed go-live date based on the dates provided by you?		
<i>RESPONSE REQUIRED</i>			
5	Describe your implementation and deployment process and include a sample project plan with your response.		
<i>RESPONSE REQUIRED</i>			
6	Will you assign a primary point of contact to work directly with the Health Department throughout this project?		
7	You have provided a detailed, comprehensive implementation/project plan and schedule with clearly articulated milestones with your response?		
8	Do you agree to provide status reports on a defined basis, tracking project progress against pre-defined milestones, describing upcoming planned activities, and documenting project risks as they arise?		
9	Do you agree to conduct status meetings on mutually agreeable dates and times?		
10	Can you provide a test environment for the customer and preproduction/staging, along with the production environment?		
11	Are there extra costs to maintain a test environment?  <i>If yes, include those in the Build of Material.</i>		
12	Can you provide a sample test plan with the proposal?		
13	You will carry out formal end-to-end functional and non-functional testing of all elements of the solution?		
14	Can your solution be implemented in a staged or modular method like a proof-of-concept?		

<b>UCaaS TRAINING</b>		<b>YES</b>	<b>NO</b>
1	Do you provide end-user training?		
2	What training options are most popular?		
<i>RESPONSE REQUIRED</i>			



3	Describe your proposed training services.  <i>Include those costs in the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			
4	What training materials and content will remain accessible to the Customer?		
<i>RESPONSE REQUIRED</i>			

<b>UCaaS SUPPORT</b>		<b>YES</b>	<b>NO</b>
1	Describe your proposed support plan, including whether you will use partners, and how the risk of a single-point-of-failure is mitigated in your design and/or address in your support plan.  <i>Include those costs in the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			
2	How would end users open tickets and receive service in your proposed support plan?		
<i>RESPONSE REQUIRED</i>			
3	What is your proposed guaranteed availability, and how is your system architecture designed to deliver this availability?		
<i>RESPONSE REQUIRED</i>			
4	What are the options you offer for Service Level Agreements (SLA)?  Are there tiered support contracts available as standard offers?  Are SLAs customizable/negotiable?		
<i>RESPONSE REQUIRED</i>			
5	The Health Department would like to consider a model where they pay a bonus for meeting SLAs, rather than assess a penalty for missing them. Would you be open to such an arrangement?		
6	Do you offshore the technical support during or after standard business hours?		
7	Can you perform upgrades by failing over and without system downtime?		
8	Where is your technical support operation located?		
9	What is the process for troubleshooting call quality problems?		
10	How are circuits monitored for degradation of service?		
<i>RESPONSE REQUIRED</i>			
11	How do you receive alarms and what is your process for responding to alerts and alarms?		
<i>RESPONSE REQUIRED</i>			
12	What are your standard and extended support hours?		

	How do you classify an urgent support issue?		
<i>RESPONSE REQUIRED</i>			
13	Describe maintenance and software assurance after the initial purchase requirements to maintain the system and perform upgrades.		
<i>RESPONSE REQUIRED</i>			

**CALL CENTER as a Service SPECIFICATIONS**

<b>CCaaS FEATURES/ROUTING</b>		<b>YES</b>	<b>NO</b>
1	Can the Automated Call Distribution (ACD) routing be defined by non-technical users?		
2	Is there a drag and drop interface for the ACD routing?		
3	Can the agent handoff and transfer a call to a non-agent user without additional licensing?		
4	Can agents belong to multiple groups/queues at the same time?  If so, what is the maximum number of queues an agent can belong to?		
<i>RESPONSE REQUIRED</i>			
5	Can a skills-based route be based on the incoming DNIS?		
6	Can your system program a skill-based on dialed number?		
7	Is call queue extension calling available?		
8	What are the options for distributing calls in a queue (round-robin, longest idle time, etc.)?		
<i>RESPONSE REQUIRED</i>			
9	Can the system administrator or operator set controls and “rules” for caller wait time and routing if the queue is unavailable?		
10	Is there a limit to the number of callers in a queue before the queue is rendered unavailable?  If so, what is the limit? Can the system admin or operator set rules for routing of calls in the event this happens?		
<i>RESPONSE REQUIRED</i>			
11	Does your system support a callback option that allows a caller to opt for a callback instead of waiting if time conditions are met?		
12	Is the agent ring timeout configurable by the administrator?		
13	Does the system support forward if unanswered where the callers are sent to an extension if the agents fail to answer before the queue ring timeout?		
14	Can the system support forward if unanswered to be sent to a secondary queue if the agents fail to answer before the queue ring timeout?		
15	Are music/messages on hold available?		
16	If music/message is available, is it configurable by any person other than the administrator?		
17	Can on-hold recordings be uploaded and activated by the Health Department administrator?		
18	Does the ACD support alternate time of day routing for after-hours, weekends, and holidays?		
19	Can alternate route rules be activated by a supervisor?		

20	Can an agent on an ACD call a place or receive a second call to/from their specific extension?		
21	Will the system force log out after a period of inactivity?  Is this configurable?		
<i>RESPONSE REQUIRED</i>			
22	Can agents perform warm and cold transfers to other agents, other queues, and non-ACD destinations?		
23	Do agents get placed in a not-ready state if they do not answer an inbound interaction?  Can this be disabled?		
<i>RESPONSE REQUIRED</i>			
24	Can a missed interaction be routed into a secondary queue?		
25	Can agents be assigned to multiple queues?		
26	Can agents be assigned to multiple channels with concurrent limits set by the channel?		

<b>CCaaS AGENT DESKTOP</b>		<b>YES</b>	<b>NO</b>
1	Describe the agent application with specific attention to streamlined workflows and ease of use. Include screenshots and attach any marketing information that may be helpful to the response.		
<i>RESPONSE REQUIRED</i>			
2	Does the agent desktop application include voice test and chat channels?		
3	Is there a wallboard application for the agents to see real-time queue status?		
4	Can the wallboard application be programmed to pop to the forefront of the agent screen?		
5	Describe how agents see their current talk and not ready times, both with hard and soft clients.		
<i>RESPONSE REQUIRED</i>			
6	Can agents enter a wrap-up state following an interaction?		
7	Can a maximum wrap-up time be set by the administrator?		
8	Can an agent mark themselves unavailable for a period of time?		
9	If the agent changes their available status to unavailable is that logged?		

<b>CCaaS CHAT</b>		<b>YES</b>	<b>NO</b>
1	Describe in detail how the chat modality works. Include how chats are initiated, prioritized, and handled by agents. Specific whether chats mix into single-call queues or are handled by call queues.		
<i>RESPONSE REQUIRED</i>			
2	For privacy reasons, chats should not be kept. What steps can you take to ensure that chats are not Persistent?		
<i>RESPONSE REQUIRED</i>			
3	Does your Contact Center provide multichannel routing, where the call will route based on the channel?		
4	Can the ACD routing be defined by non-technical users?		
5	Is there a drag and drop interface for the ACD routing?		

<b>CCaaS LICENSING</b>		<b>YES</b>	<b>NO</b>
1	Do licenses need to be assigned to individuals or is there a concurrent use option available?  Explain how licensing works and note whether that option is available in the Build of Materials.		
<i>RESPONSE REQUIRED</i>			
2	Do Contact Center Agents need both telephony and a CCaaS license? <i>If so, please explain here and indicate that in the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			

<b>CCaaS REMOTE AGENTS</b>		<b>YES</b>	<b>NO</b>
1	Do remote/at-home agents have all the same capabilities as office-based agents?  <i>If no, describe the difference below.</i>		
<i>RESPONSE REQUIRED if answered NO</i>			
2	What are the minimum bandwidth and network performance characteristics needed for remote workers?  Is there a tool to test a connection?		
3	Does a remote worker need a hard-wired connection to their router?		
4	For a backup connection, can a mobile carrier dedicated hotspot be used?		

5	Are there any special settings (ports opened, NAT, etc.) for a remote worker's residential gateway which need to be taken into consideration?  Please explain.		
<i>RESPONSE REQUIRED</i>			

<b>CCaaS REPORTING</b>		<b>YES</b>	<b>NO</b>
1	Provide information that describes your Contact Center reporting and analytics in detail below.		
<i>RESPONSE REQUIRED</i>			
2	How many pre-built reports are available out-of-the-box?  Provide a summary list of those.		
<i>RESPONSE REQUIRED</i>			
3	Can the customer build custom reports without having vendor intervention?		
4	If so, do custom reports require any third-party applications or reporting tools?  Describe below and include this in the Build of Materials.		
<i>RESPONSE REQUIRED</i>			
5	What technical skills are required to customize reports?		
6	Can report data be exported?  What file formats are supported?		
<i>RESPONSE REQUIRED</i>			
7	How is access to reports managed, can supervisors or others run their own ad-hoc reports?		
8	Can data be stored indefinitely for reporting purposes?		
<i>RESPONSE REQUIRED</i>			
10	Do standard reports include all interaction channels?		
11	Can historical data be moved from your storage to the Health Department server?		
12	Can reports be scheduled and distributed?  Please describe how/what methods and any APIs are provided:		

<b>CCaaS SUPERVISOR</b>		<b>YES</b>	<b>NO</b>
1	Can a supervisor silent monitor through a secondary extension?		
2	Does the application display real-time agent interaction, queue, and dialer methods for all agents, including remote/at-home?		
3	Can a supervisor's alerts include visual, audible, text, and email alerts when critical thresholds are missed?		
4	Can supervisors broadcast messages to groups?		
5	Can supervisors and agents send messages to one another?		
6	Can supervisors remotely log out agents?		
7	Do you provide a mobile application for supervisors?		
8	If a mobile application is available, what capabilities does it provide?  Are there features on the desktop application that are not available on the mobile application?		
<i>RESPONSE REQUIRED</i>			
9	Does your solution have a dashboard that allows supervisors/managers to view the status of all their agents in real-time?  If so, is it configurable?		
10	Is the dashboard showing near real-time or delayed data?  If delayed, how long is the delay? Is it configurable?		
<i>RESPONSE REQUIRED</i>			

<b>CCaaS HIPAA</b>		<b>YES</b>	<b>NO</b>
1	Is your system HIPAA compliant?		
2	Are you able to execute a Business Associate Agreement if necessary?		
3	Is there any Protected Health Information (PHI) stored in the system?  If yes, please elaborate:		
<i>RESPONSE REQUIRED if answered YES</i>			

<b>INSTALLATION/IMPLEMENTATION</b>		<b>YES</b>	<b>NO</b>
1	What is your proposed local installation strategy?  If customer resources are needed for software/hardware or CPE indicate below.		
<i>RESPONSE REQUIRED</i>			
2	What is the lead time in the supply chain for the on-premises equipment in your proposal?  Are there constrained products?		
<i>RESPONSE REQUIRED</i>			
3	What is the typical implementation timeframe for a solution of this kind?		
<i>RESPONSE REQUIRED</i>			
4	What is the proposed go-live date based on the dates provided by you?		
<i>RESPONSE REQUIRED</i>			
5	Describe your implementation and deployment process and include a sample project plan with your response.		
<i>RESPONSE REQUIRED</i>			
6	Will you assign a primary point of contact to work directly with the Health Department throughout this project?		
7	You have provided a detailed, comprehensive implementation/project plan and schedule with clearly articulated milestones with your response?		
8	Do you agree to provide status reports on a defined basis, tracking project progress against pre-defined milestones, describing upcoming planned activities, and documenting project risks as they arise?		
9	Do you agree to conduct status meetings on mutually agreeable dates and times?		
10	Can you provide a test environment for UAT and preproduction/staging, along with the production environment?		
11	Are there extra costs to maintain a test environment?  <i>If yes, include those in the Build of Material.</i>		
12	Can you provide a sample test plan with the proposal?		
13	You will carry out formal end-to-end functional and non-functional testing of all elements of the solution?		



<b>TRAINING</b>		<b>YES</b>	<b>NO</b>
1	Do you provide end-user training?		
2	What training options are most popular?		
<i>RESPONSE REQUIRED</i>			
3	Describe your proposed training services.  <i>Include those costs in the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			
4	Is there training content that is available to the Department of Health after installation that can be re-visited by the personnel? Please describe what format the content is in.		
<i>RESPONSE REQUIRED</i>			

<b>SUPPORT</b>		<b>YES</b>	<b>NO</b>
1	Describe your proposed support plan, including whether you will use partners, and how the risk of a single-point-of-failure is mitigated in your design and/or address in your support plan.  <i>Include those costs in the Build of Materials.</i>		
<i>RESPONSE REQUIRED</i>			
2	How would end users open tickets and receive service in your proposed support plan?		
<i>RESPONSE REQUIRED</i>			
3	What is your proposed guaranteed availability, and how is your system architecture designed to deliver this availability?		
<i>RESPONSE REQUIRED</i>			
4	What are the options you offer for Service Level Agreements (SLA)?  Are there tiered support contracts available as standard offers?  Are SLAs customizable/negotiable?		
<i>RESPONSE REQUIRED</i>			
5	Do you offshore the technical support during or after standard business hours?		

6	Can you perform upgrades by failing over and without system downtime?		
7	Where is your technical support operation located?		
8	What is the process for troubleshooting call quality problems?		
9	How are circuits monitored for degradation of service?		
<i>RESPONSE REQUIRED</i>			
11	How do you receive alarms and what is your process for responding to alerts and alarms?		
<i>RESPONSE REQUIRED</i>			
12	What are your standard and extended support hours?  How do you classify an urgent support issue?		
<i>RESPONSE REQUIRED</i>			
13	Describe maintenance and software assurance after the initial purchase requirements to maintain the system and perform upgrades.		
<i>RESPONSE REQUIRED</i>			

Please submit form to:

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