

DEPARTMENT OF THE NAVY
HUMAN RESOURCES BENEFITS CONTACT CENTER
PERFORMANCE BASED STATEMENT OF WORK (PBSOW)

1.0 SCOPE OF WORK

1.1.1 This PBSOW provides for the establishment and operation of the DON Civilian Human Resources Benefits Contact Center (HRBCC), a dedicated single service contact center (contractor personnel will be dedicated to the taskings within this PBSOW). For the purpose of this PBSOW, the HRBCC will be referred to as the "contractor". Additionally, employee refers to civilian employees working or formerly working for the DON. Addendum 1 lists the acronyms used in this PBSOW. The contractor will provide the full range of support to current and separated Navy civilian employees and prospective employees. Prospective employees are defined as employees who have received a job offer a position with the DON but are not processed in the personnel system. Employees are located world-wide. The contractor will provide technical guidance, advice, and information to employees about the FEHB, the FEGLI and the TSP programs and employee entitlements. The contractor will provide limited information on Federal retirement programs. The contractor will guide employees to retirement information on the OCHR civilian portal page or other approved web sites or refer employees to a CBC Specialist. The contractor will assist employees in accessing the EBIS and making transactions. The contractor shall also assist former spouses and children of employees regarding information on benefits upon request. It is also recognized that the contractor may receive contacts on non-benefit related matters. In such cases the contractor shall respond by providing limited information furnished by the government. The contractor shall also receive calls from hearing impaired employees by using a TTY/TDD telephone for the deaf and hard of hearing. For the purpose of this contract "contact" is defined but not limited to the following means of communication received: telephone calls, email, fax, or mail. As part of this assistance, the contractor shall adhere to all requirements of the Privacy Act. Historical workload data is provided in section 12.0.

1.1.2 Information is defined as responses to all requested queries contained in the following references: (1) 5 CFR, Chapter 1, Parts 870, 890, 892, 1600; (2) OPM's FEHB and FEGLI Program Handbooks; (3) TSP bulletins; (4) approved written scripts to be provided by the CBC Liaison and (5) approved web sites referenced in the written SOPs. The handbooks are available at www.opm.gov and the TSP bulletins are available at www.tsp.gov. The contractor shall use written SOPs provided by the government. If questions arise regarding handoff points, the CBC Liaison shall

serve as the POC between the contact center and the CBC staff, except as specified in the government furnished SOPs.

1.1.3 Employees may use the self-service tool, EBIS, or may be assisted by a counselor to make benefit transactions. Counselor assistance is available through the Benefits Line. The contractor shall encourage and support the employees' use of EBIS. The contractor shall understand the data elements used by employees in order to access the EBIS.

1.1.4 Functional assistance provided by the government shall be minimal and limited to complex areas requiring the review of an eOPF , or immediate and emergent benefit requirements. The CBC Liaison shall identify and resolve DON wide issues, provide direction to the contractor and act as a liaison between the contractor and the CBC staff.

2.0 OPERATIONAL SCHEDULE

2.1 The contract will be a firm fixed price contract for a period of performance commencing 1 October 2016 through 30 September 2021 (base period with four 12-month option periods). The contract includes provisions for option periods dependent upon government need and continued satisfactory contractor performance.

2.2 Working Hours, Holidays and Other Facility Closures. The operational hours of the contact center shall be from 7:30 AM to 7:30 PM, Monday through Friday, ET, excluding the observed government holidays listed below.

New Year's Day	1 January
Martin Luther King Jr. Day	Third Monday in January
Presidents' Day	Third Monday in February
Memorial Day	Last Monday in May
Independence Day	4 July
Labor Day	First Monday in September
Columbus Day	Second Monday in October
Veteran's Day	11 November
Thanksgiving	Fourth Thursday in November
Christmas Day	25 December

However, during any open season period, the hours of operation will be from 7:30 AM to 9:30 PM, Monday through Friday, ET. The contractor is responsible for staffing the call center during the operational hours.

3.0 SERVICES TO BE PROVIDED

3.1 The contractor shall be the first entry point of contact for current and separated Navy civilian employees and prospective employees who have been offered a position with the DON. These employees are seeking advice and guidance and information regarding the following programs: (1) FEHB; (2) FEGLI; (3) TSP; and (4) Retirement as specified in section 1.1.1 of this PBSOW as well as described in SOPs. The contractor shall also assist former spouses and children of employees regarding information on TCC or FEHB and shall provide a TCC package upon request. This will include accepting or providing other regulatory documents as described in SOPs (court orders or providing former spouses guidance on Spouse Equity Act).

It is also recognized that the contractor may receive contacts on non-benefit related matters. In such cases the contractor shall respond by providing limited information furnished by the government. The contractor shall also receive calls from deaf and hard of hearing employees by using a TTY/TDD telephone. The government shall handle and respond to matters generated by government agencies (OFEGLI, OPM, TSP, payroll offices, HROs, etc.). In cases where OFEGLI makes a decision on request for insurance, notification will be forwarded to the contractor and processed in accordance with SOP. The contractor will receive notices of TSP Hardship Withdrawals from payroll offices for action. All correspondence received daily by the contractor will be stamped indicating the date and time of receipt.

3.2 The contractor shall serve as a clearinghouse for the government for benefits related forms and packaged information including but not limited to retirement packages and beneficiary forms, to be mailed out and distributed as requested by callers or by the government staff. The contractor may be tasked to distribute other printed materials to designated activities and/or employees when required. Distribution of benefits related materials includes letters, forms/brochures/pamphlets via mail, email, or fax. A list of requested benefits forms can be found on the Portal page under Team Sites, Benefits at, <https://portal.secnav.navy.mil/orgs/MRA/DONHR/Benefits>).

3.3 The contractor shall use BENEFORMS or other DON approved software when completing transactions. Contractor personnel shall demonstrate technical proficiency when responding to questions and provide accurate information and transaction processing.

3.4 The contractor shall be knowledgeable and conversant with the contents and capabilities of the benefit applications, the government's portal and the SOPs as indicated in section 4.16. In addition, the contractor shall perform the full range of

transaction processing (accurately and timely) in the areas of FEHB, FEGLI, and TSP in the operation of the benefits contact center but shall also be able to assist callers in completing their own transactions.

3.5 The government expects the contractor to provide correct information to callers' inquiries at all times. All calls shall be answered within an average of two (2) minutes or less, with the exception of the months of November through January. During these months, when call volume peaks, all calls shall be answered within an average of seven (7) minutes or less.

3.6 The contractor shall review and reconcile daily rejected transactions to include carrier feed and BRATT reports, as shown through an electronically generated report by GFSA. Transactions rejected from the carrier feed will be fixed prior to the next run.

3.7 The contractor shall respond to email inquiries for all serviced customers within two (2) business days from the receipt of the email (ET). In addition, the contractor shall respond to email inquiries received via the NavyBenefits@navy.mil email address. The contractors may respond to email requests in the U.S. via email or telephonically. Respond via email to personnel that are located overseas due to time zone differences. All email responses are to be copied into the current WTS. Inquiries outside the contractor's scope of responsibility shall be forwarded to the CBC Liaison for resolution. The CBC Liaison shall be copied on all email responses.

3.8 The contractor shall be responsible for implementing technical or procedural changes to remain current with the benefit program areas.

3.9 The contractor shall enter and maintain workload in the current WTS as defined in established SOPs. The contractor shall electronically record and track the history of all contacts with customers (mailings, telephone calls, faxes, emails) and actions rerouted to the CBC. New work shall be entered within one business day of receipt to ensure that WTS is updated continuously (in real time and not retroactively) and accurately completed (resolved) within 2 business days, if resolution can be made. The contractor shall also notate the disposition of each call in the WTS ticket. The contractor may be asked to scan documents in the eOPF as necessary.

3.10 The contractor shall not enter non-benefit related calls or emails in the WTS. Some examples include calls referring to TWMS, myPay, employment, or verification of employment and myBiz.

However, the contractor shall track non-benefit related calls for reporting purposes. The contractor shall use scripts provided by the government in responding to callers/emailers who have non-benefit related issues.

3.11 The contractor shall be responsible for all expenses associated with all required mailings. First class postage is required. Traceable mailings are identified in the SOPs. One example is the follow-up letter to the employee requesting supporting documentation for a life or health insurance change. There is no requirement for the contractor to perform a QC on each benefit change. QC requirements are identified in SOPs. Notification letters shall be sent within 10 days from receipt of report to employees who are required to provide documentation for proof of coverage entitlement.

To assist in mailing costs, the contractor may combine mailings or utilize the employee's government email address. The contractor may forward attachments via email to employees who request that service. (Emails will be encrypted if PII data is provided.) This does not apply to traceable mailings. The use of employee's personal email addresses can be used as long as no PII data is shared.

3.12 The contractor shall be responsible for scanning, uploading and verifying benefit documents in e-OPF as identified in the SOPs. Upon request the contractor will manually prepare benefit election forms and upload to eOPF as directed by the government. Documents shall be uploaded into eOPF within (15) business days after completion of all required actions unless otherwise specified in SOPs. Delay of scanning documents into eOPF may occur during an FEHB/FEGLI OS when CSRs are needed to take calls, perform transactions. Other reasons include large mail outs and emails of employee notices. The contractor shall track the number of documents scanned to the e-OPF for reporting purposes.

3.13 The contractor shall be responsible for generating reports from the GFSA or their call center solution. The reports will be used to perform certain tasks as specified in the SOPs. The current contractor employs one fulltime FTE to complete the LWOP process. Reports shall be generated timely and completed as specified in the SOPs. Examples include LWOP, return to duty, QCs, reemployed annuitants, temporary employee notices and transaction statistics/workload reports. In addition, due to changes in the regulations, the contractor may receive additional reports from the CBC. The reports will be completed in accordance with guidance provided by the CBC Liaison. This includes the annual FEHB OS and special benefit enrollment periods, as well as a FEGLI Open Enrollment period.

3.14 The contractor shall shred all working notes, paper copies of forms, and any related documentation with customer transaction information, using the crosshatched method, after one year.

3.15 The contractor shall utilize DCPS and DFAS Remedy for problems with benefit elections in payroll and report as necessary to the proper CBC for correction. The contractor will determine who on the contractor's staff will have access to DCPS and Remedy. Contractors will follow SOP guidance for accessing and understanding the DFAS applications. Contractor personnel will be required to take an online test for security measures and submit the request form to the CBC Liaison. The CBC Liaison or government personnel will submit it to DFAS for processing. The contractor is responsible for maintaining access to all GFSA (such as DCPS and Remedy accounts) and report within 24 hours a contractor's loss of access.

3.16 The government shall provide a detailed SOP manual on the business processes. Any SOPs included as part of this PBSOW are subject to change. New SOPs may be added and vetted as necessary in accordance with legislative or regulatory changes and new initiatives. SOPs identify contractor responsibilities, business processes, and time frames for completing various benefit processes. A disc of the SOPs will be shared when the solicitation is released. Because SOPs may change, another set will be shared at the time of contract award. References to the Benefits Line in the SOPs are referring to the contractor.

4.0 PERSONNEL REQUIREMENTS

4.1 All employees of the contractor employed in the performance of work under this contract shall be employees of the contractor at all times and not employees of the government. All employees shall be a U.S. citizen. No contractor employee will be given access to DON PII information or systems prior to clearance by the government's security officer. Each contractor employee must obtain and maintain Secret Clearance eligibility by the way of a NACLIC. In order to access Government databases, the contractor contact center personnel shall have a favorably adjudicated NACLIC. The cost if any to complete the NACLIC to acquire a Secret eligibility level clearance shall be the responsibility of the contractor. The contractor shall use eQIP to initiate security investigations. The contractor is responsible for submitting all documents to OPM in obtaining the specified level of clearance stated above.

The Government shall issue a DD Form 254, DOD Contract Security Classification Specification to the contractor in order to complete the security process.

In addition to the CAC and a Secret eligibility level clearance, all contractor employees shall fill out and provide to the government (the COR) a System Authorization Access Request Navy (SAAR-N) form. The official form number is OPNAV 5239/14.

4.1.A. Contractor employees will not be given access to the DON's PII data or access to any system which contains PII data prior to clearance by the government's Security Manager. The contractor shall ensure all contractor employees successfully meet the investigation requirements for the above stated level of security clearance. The contractor shall provide documentation to the government sponsor in regards to security clearances via a Visit Authorization Request (VAR) in JPAS, in addition to building contractor employee profiles in JPAS. The Government's Security Manager shall grant access to government systems under an interim clearance, at a minimum.

4.1.B. For each contractor employee, the contractor is required to submit a registration request in the Trusted Associate Sponsorship System (TASS). The Government Security Manager will process the TASS request allowing the contractor employee to obtain a CAC.

4.1.C. The contractor shall provide documentation to the government sponsor in regards to CACs and security clearances. Once the government's Security Manager grants access, each contractor employee shall acquire a government CAC. CAC offices are listed in the GFE Resolution Procedures. Travel cost to acquire the CAC shall be the responsibility of the contractor. CACs are obtainable at military security offices, to include but not limited to Navy installations.

4.1.D. Contractor employees shall use the CAC to access government computers and applications, which require DOD digital certificates. All CACs shall be relinquished to the government upon a contractor employee's separation, or upon the end of the contract period of performance.

4.2 Contact Center Personnel. Certain experienced personnel are essential for successful contractor accomplishment of the work to be performed under this contract. The Contact Center Manager and Lead Functional Assistant are considered key personnel. A detailed approach shall be submitted to describe the work experience and the qualifications for the Contact Center Manager and Lead Functional Assistant, which shall contain information sufficient to demonstrate that the proposed individuals meet the

requirements set forth below. The knowledge and experience level of personnel will not require intercession by any CBC personnel to resolve problems.

4.3 No substitution or addition of key personnel shall be made except in accordance with the following. The contractor agrees that during the **first 120 days** of the contract performance period, no key personnel substitutions will be permitted unless an individual's sudden illness, death, or termination of employment necessitates such substitutions. In any of these events, the contractor shall promptly notify the COR and provide a detailed explanation of the circumstances necessitating the proposed substitution. The contractor shall provide a complete resume for the proposed substitute, reflecting the same or greater qualification experience to the COR for review. The COR will evaluate the requests for substitution and addition of personnel and forward to the CO for approval/disapproval. The CO will promptly notify the contractor in writing whether the request is approved or disapproved.

4.4 Contact Center Manager: Shall have five (5) years or more general supervisory experience in contact or call center operations. This skill experience shall be equivalent to General Schedule (GS)-0201-12, Supervisory Human Resources Specialist (Employee Benefits), as defined in the Position Classification Standards handbook for federal employees located on the OPM web site at: <http://www.opm.gov/fedclass/html/gsseries.htm>. Experience in query-based systems is preferred. Shall have experience in: directing work, monitoring workflow, evaluating performance, writing reports, analyzing data, identifying problems, and providing customer feedback. Shall have demonstrated customer service interface expertise and ability to prioritize assignments among equally time sensitive work projects. Shall have skill in following written directives, and inter-agency work protocols. Shall have ability to identify system generated problems and employee generated errors, providing a clear description of the issue and an easy-to-follow suggested resolution. Shall have conflict resolution techniques sufficient to interact in occasional highly charged emotional situations because of delicate or highly contested case matters and determinations. The Call Center Manager shall be co-located with the majority of the CSRs in order to supervisor operations effectively. It is important that the manager/supervisor is on site to ensure the day to day operations are performed in accordance the provisions of this contract as well as following the policies/procedures in the SOPs.

4.5 Lead Functional Assistant: The LFA shall possess a competent understanding of the regulations and policies involved in federal benefits processing. Shall have three (3) or more years

experience in processing and providing advice and guidance in Federal benefits (FEHB, FEGLI and TSP) gained within the last five (5) years. This skill experience shall be equivalent to General Schedule (GS)-0201-11, Human Resources Specialist (Employee Benefits), as defined in the Position Classification Standards handbook for federal employees located on the OPM web site at: <http://www.opm.gov/fedclass/html/gsseries.htm>. Shall have demonstrated proficiency to lead/supervise personnel. The LFA shall be co-located with the majority of the CSRs in order to lead effectively. The day to day operations performed by LFA with the CSRs will allow the LFA to administer sound judgment and bring critical issues to the attention of the Contact Center Manager and CBC Liaison immediately. The LFA will ensure that the contractors remain competent and current on DON applications and issues. The LFA shall have a full range of demonstrated competencies in FEHB, FEGLI and TSP programs. Shall have customer service relationship skills to address complaint and problem resolutions, ability to identify critical issues and bring to the attention of the Contact Center Manager (as applicable) and provide sound judgment in recommending solutions as appropriate, ability to advise/resolve moderately complex, non-controversial, procedural or recurring issues for which there are one or more readily apparent solutions.

4.6 Customer Service Representative (CSR): Shall have a minimum of one year experience in customer service/customer relations in addressing complaints/resolving problems and skill in clearly communicating factual and procedural information orally and in writing. Shall have skill in office automation, data entry and retrieval and is a qualified typist (40 words per minutes). All CSRs under the life of the contract shall have the training identified in section 6.0. In addition, all CSRs shall possess sufficient technical knowledge, at the full performance level, of FEHB, FEGLI and TSP and the EBIS to answer questions identified in reference material and related web sites. CSRs will guide employees to retirement information on the CBC or other approved web sites or refer employees to a CBC Specialist.

*Please note the government recognizes that contractor CSRs may be hired at the entry level, not possessing the skills required to be at the full performance level. In such cases, the contractor is permitted to delegate certain taskings to these entry level CSRs, such as allowing them to respond to calls that are less technical in nature in order to gain proficiencies of the skill level required. Some examples include assisting employees with accessing EBIS, mailing forms, working internal reports, scan and upload documents to eOPF. However, CSRs in training, will have their calls/work monitored to ensure accurate information is given until such time the contractor has certified that the CSR is competent.

4.7 Administrative Clerical Support: Shall be able to follow directions and communicate with office staff. Ability to print, sort, file, copy, scan and upload documents to eOPF, retrieve and organize information; experience with office equipment such as computers, copiers, fax machines, scanners, and typewriters and the ability to enter data in spreadsheets, databases, and reports.

4.8 Computer Specialist (Technical): Shall have a minimum of one-year experience in Windows XP or higher and server maintenance. Shall be able to troubleshoot technical problems (workstation, communication (data and voice) and LAN) within the contact center and between the contact center and the government's IT personnel. Shall be able to communicate orally and in writing.

5.0 TRAINING REQUIREMENTS

5.1. In the event the contractor has previously operated a Navy Benefits Contact Center, the LFA shall receive annual benefits update training that will be taken from the "Approved Provider Courses" listed below. Substitution of similar courses shall be subject to government review/approval by the COR. Courses will be completed at the contractor's expense. Written verification of completion of courses shall be provided to the CBC Liaison.

5.2 If the contractor has not previously operated a Navy Benefits Contact Center, the LFA and the CSRs will be expected to attend a one-time government-furnished, on-the-job training (at the contractor's facility) to learn the Navy Benefits systems and standard operating procedures. After the one time government furnished training, subsequent hired employees shall be trained at the contractor's expense.

5.3 Contractor personnel shall be trained on the benefit SOPs and general business practices and training on GFSA. The contractor shall ensure that the LFA and CSRs are competent to use the applications and understand the SOPs before they respond to callers or emails.

5.4 Prior to the government-furnished training, the LFA and the CSRs shall complete two (2) or more of the training courses listed under the Approved Provider Courses below, at the contractor's expense, and provide proof of successful completion to the COR. The contractor can expect that two or more training classes can be completed within one week. Substitution of similar courses shall be subject to government review by the COR.

5.5 It may be beneficial for the contractor to work with an approved training vendor to ensure the provider emphasizes the training specifically needed to answer the types of queries on the federal benefits issues that fall within the scope of the contract. Upon completion of the government and private vendor training, CSRs should demonstrate specialized knowledge of the FEHB, FEGLI and TSP programs and at a minimum be able to:

- Locate and identify regulatory and procedural guidance regarding federal benefits. (Vendor)
- Know the location and content of benefit related web sites (CBC, TSP, OPM, BENEFEDS, FSA, LTCFEDS). (Government)
- Know and utilize all benefits related tools available on the above web sites pertaining to FEHB, FEGLI, TSP and retirement. (Vendor)
- Explain to customers what each web site offers. (Vendor)
- Understand the fundamentals of FEHB, FEGLI and TSP including enrollment codes, status codes, how FEGLI codes are derived, calculating costs and coverage amounts, effective dates, QLEs, event codes, comparison charts, open season, and any other information needed to process actions in these areas. (Vendor)
- Advise new, current and separating employees on their federal benefits. (Vendor)
- Advise former spouses and children on their TCC benefits. (Vendor)
- Explain the impact of canceling or reducing benefits coverage (FEHB, FEGLI and TSP) in relation to retirement. (Vendor)
- Explain the affect LWOP has on federal benefits. (Vendor)
- Understand the Service Computation Date used to access the EBIS. (Government)
- Benefits for Part-time employees. (Vendor)
- Benefits for Temporary and Term employees. (Vendor)
- Apply the business processes as outlined in the SOPs. (Government)

5.6 It is the responsibility of the contractor to ensure that the contact center staff remains competent and current on DON applications and issues. As cited in section 6.0 the contractor will be responsible for training new hires on all topics covered in the government furnished training plus updates as they occur.

APPROVED PROVIDER COURSES

S. Harman & Associates, Inc.
P. O. BOX 1129
Sykesville, MD 21784
Telephone: (410) 795-9296

*Advanced Employee Benefits
Workshop
*Basic Employee Benefits
Training
*Processing Employee Benefits
Benefits Workshop

Site address: <http://www.sharmansite.com>

Graduate School USA
600 Maryland Avenue, S.W.,
Suite 120
Washington, DC 20024-2520
Telephone: (202) 314-3320
Site address: <http://www.grad.usda.gov/>

*Benefits for HR Staff

**Government, Retirement
& Benefits, Inc.**

330 John Carlyle Street
Suite 600
Washington, DC 23314
Telephone: (703) 461-9100

*Employee Benefits
Determinations
*Benefits Personnel Actions
for Personnel Mgmt &
Staffing Specialist
*Comprehensive Federal
Employee Benefits Training
*Advanced Employee Benefits

Site address: <http://www.grbinc.com>

5.8 The contractor shall provide two copies of the training material from the vendor who trained contractor personnel on Federal benefits to the COR.

5.9 The contractor is responsible for training its personnel and the government personnel on the contact center technology solution (VOIP) and related applications. The contractor shall provide a computer to access the call center software, if required.

5.10 Any new CSRs hired as replacements or supplements to the original staff who does not attend the above training or the government furnished on-the-job training will undergo training and certification testing conducted by the Contractor. The contractor shall submit the CSR Course curricula to the COR for review within 30 days prior to the start of any subsequent new hires.

5.11 The contractor shall ensure training of all personnel in PA regulations and Customer Service Interpersonal skills in a Contact Center Environment prior to the start of contact center operations. Additionally, the contractor's personnel shall

complete all mandated DoD online training required to access government computers.

6.0 TECHNICAL REQUIREMENTS

6.1 The government will maintain its infrastructure for the DON's ADP and IT needs. The government will allow the contractor access to its information systems in accordance with DOD and DON guidelines, utilizing DON furnished/approved laptop workstations. The government will also provide external hard drive(s). The contractor shall provide printers and scanners to meet the requirements of this SOW. The contractor shall also be responsible for providing monitors (VGA, S-Video, DVI, etc.), keyboards (USB), and mice (USB), if desired. The contractor shall contact the COR for DON approved devices. The contractor's access to the DON information systems is necessary to fulfill the government's requirement(s) as outlined in this SOW. The DON's infrastructure will include but is not limited to circuits, routers, switches, network interface cards, communications software, database servers, email capability, application software, security hardware and software, etc. The DON enclave is the Navy Marine Corps Intranet (NMCI). Access to the Navy's enterprise network is governed by the Commander of the Naval Network Warfare Command (NETWARCOM), which requires contractors to use GFE.

- **Electronic Mail Capability.** The contractor shall utilize DON's email capability, including all hardware and software, necessary to store, send, and receive email messages with attachment technology for the entire contact center staff. The electronic mail is required to send and receive messages from DON customers, and government personnel. The contractor shall access the email from their government provided laptops.
- **Email Inquiries.** The contractor shall respond to email inquiries from customers as specified in section 4.7 of this PWS. The contractor shall invoke an automatic reply/response to email messages that come to this address. The following email address shall be used: NavyBenefits@navy.mil. The contractor may determine to use individual navy email addresses when appropriate.

The contractor shall comply with the security process, policies, procedures, and requirements as outlined in the CJCSI document (CJCSI 6211.02C), and the DOD PPS Assurance Category Assignments List. The contractor is only authorized to work on the GFE from within the contractor's approved working facilities; no GFE may be removed from the contractor's facility without authorization

from the government COR; including working from home and/or teleworking as outlined by the DON's SECNAV Instruction 12271.1.

The contractor shall adhere to all DOD computer security regulations, guidelines, and policies concerning government and NIPRNET access. The contractor shall also follow all DON computer security regulations, guidelines, and policies. In addition, the contractor shall retrieve, store, use, and handle data in accordance with all government PA regulations of 1974.

The contractor shall process, transmit, and/or store PA data to the same level as the government. The contractor shall conduct IA Self-Assessments every six (6) months, and take annual IA training as prescribed by the government. The contractor shall be subject to announced and unannounced onsite and remote IA assessments for conformance to DOD IA policies.

6.2 The contractor shall be required immediately after contract award to provide the number of personnel identified in section 5, so that the Government can provide equipment and software for each contractor employee. Additionally, the contractor will comply and adhere to all schedules with the process of "technical refreshes" of computers. Costs associates with this process are the responsibility of the government.

6.2.1 Hardware and Software Installation. The contractor shall assemble all hardware, install all software, and configure all contractor equipment to meet the contractor operational requirements as specified below.

6.2.2 Electronic Interface. The contractor shall provide all hardware, software, and communications technology to electronically interface with the EBIS database and web benefit applications. This interface shall include internet access. The electronic interface equipment/materials shall include but is not limited to routers, servers, PCs, data circuits, voice circuits, network interface cards, communications software, office equipment, maintenance. The hardware, software, and communications technology shall be in addition to GFM/E. This hardware, software, and communications technology will support the following system requirements.

6.2.3 VOIP Solution. The contractor shall implement and use a VOIP Contact Center solution for the government which has the capability to voice average call wait time and the number of callers in the queue to reach a CSR. Voiced call wait times and callers waiting in the queue is updated as additional callers are holding/assisted. In addition, the contractor shall have "Call Recording" capability to record incoming calls in real time. The contractor will record conversations dealing with terrorism,

security threats to their office or to the government. The contractor shall provide all hardware, software, and services to implement the VOIP solution. The contractor shall allow the contact center staff to manage incoming and outgoing calls via the call center management software. The contractor shall voice scripts provided by the government to meet specific situations, e.g. hours of operation, period of heavy call volume, how to access EBIS. The call center management software shall also provide for regular call center reports for the government's review and use.

6.2.4 Government Access and Training of Personnel. The contractor shall allow government employees to receive contact center calls for monitoring by the COR in accordance with the Quality Assurance Surveillance Plan (QASP) Matrix. The contractor shall train the COR on the use of the contact center software that the contractor is utilizing. Each of these prerequisites will be coordinated with the contractor after contract award.

6.2.5 Telephone Service. The contractor shall provide telephonic services including hardware to receive and make local and long distance phone calls including faxes in the performance of contractor duties.

The contractor shall provide a contact center solution that is completely web based (zero foot print) that does not require any client type software or utilities to reside on the laptops. The GFE can be used to access the web based solution. If the contractor's contact center software solution is not completely web based, the contractor shall provide the additional hardware/computers to manage the contact center software. PII data shall not reside on the contractor supplied hardware/software systems.

The government shall be able to monitor all calls via the contractor solution in real time or via recordings.

6.2.6 Printing and scanning. The contractor shall provide laser quality printing capability to print benefit forms, miscellaneous documents and files. All laser printers shall be able to print 25 or more pages per minute. Each printer must be compatible with the NMCI architecture.

The contractor shall also provide scanners. Documents will be scanned into the GFE. The scanners shall be able to scan at least four (4) pages per minute in high resolution at 24000 dpi optical resolution and 48-bit color. The contractor shall provide scanner that are compatible with the NMCI architecture.

The printers and scanners shall not be setup as network devices, as the NMCI cannot access and setup the needed queues on a non NMCI network. The printers and scanners shall be locally attached to the workstation(s). The driver(s) for both devices will be a part of the GFE. The contractor shall provide the government all brand names and model numbers of the printers and scanners for the NMCI to install the appropriate drivers on the local workstation(s).

6.2.7 Licenses. The contractor shall provide/purchase all essential software licenses to perform required contact center tasks as outlined in this PWS. The contractor shall not purchase licenses for software provided as GFM/E.

6.3 Maintenance and Problem Resolution.

6.3.1 GFE for use under this contract is provided in accordance with FAR clause 52.245-2 Government Property (Fixed Price Contracts) (DEC 1989). The government shall provide DON approved laptops, external hard drive(s), and access to the GFSA as stated in the section below to meet the operational requirements as specified in this SOW. Network access and GFE problems shall be resolved according to DON guidelines and NMCI procedures as described below.

6.3.1.1 Updates from NMCI to the GFE are pushed to users on a regular or daily basis. The contractor shall allow the updates to take place immediately or according to the allowed options.

6.3.1.2 The external hard drive(s) shall be used for frequent/regular backups of user data from the GFE. On the laptops:

- o The autoplay shall be disabled.
- o Peripherals requiring unauthorized software are not allowed.
- o Executable files not recognized by the NMCI system shall result in that account being locked.
- o Do not attempt to install any non-approved software.
- o Thumb drives are not authorized for use with the GFE.

6.3.1.3 The GFE shall be repaired or replaced according to DON guidelines and NMCI procedures. The government will provide the GFE Resolution Procedures in a separate document. The contractor shall adhere to all NMCI regulations. Any misuse may result in personnel accounts being locked which could take up to two weeks to restore. The DON has to approve the account restoration, and the workstation will have to be cleaned if unauthorized software was added.

6.3.1.4 The contractor shall be responsible for their travel to and from the local approved NMCI sites to resolve NMCI issues and problems as necessary as indicated in the GFE Resolution Procedures. Approved NMCI sites are listed in the GFE Resolution Procedures. Sometimes the contractor employee assigned to the GFE shall be involved in the resolution process, thereby, requiring the individual to travel to the nearest NMCI site. After the hardware problems have been resolved, the contractor shall return to the HRBCC.

6.3.1.5 The following GFSA are currently operational within OCHR or elsewhere with the oversight of the government:

- o EBIS
- o Workload Tracking System
- o BENEFORMS
- o BRAAT
- o HITS
- o HRLink
- o eOPF
- o TWMS
- o DCPS

6.3.2 **SOFTWARE LICENSES.** The government shall possess and maintain licenses for each of the GFSA.

6.3.3 Given the current industry environment with changing software technology and software development, the government will refresh its software applications, and hardware periodically. The government will coordinate with the contractor as necessary to effect pertinent GFSA and hardware changes.

6.3.4 At all times the contractor shall establish a communication link to the government furnished systems without failure lasting more than four hours, in order to provide services rendered under this contract.

6.5 The Contracting Officer's Representative (COR) is responsible for minimal support to the contractor in the area of IA, GFE hardware and software support, & NMCI problem resolution. The COR will make announced or unannounced HRBCC site visits as necessary.

7.0 TTY/TDD CAPABILITY

7.1 In accordance with the ADA requirements, the contractor shall provide TTY/TDD capability in order to service the deaf/hard of hearing customers. This service shall be toll free.

8.0 GOVERNMENT FURNISHED INFORMATION

8.1 The government will provide the following:

- Standard Operating Procedures (SOPs) for benefit processes
- CBC Points of Contact
- Health insurance providers and points of contact
- User Manuals for benefits applications
- Monthly report template used by the contractor to report performance

9.0 REPORTING REQUIREMENTS

9.1 All reports shall be submitted in an electronic Microsoft Office format to the COR. For the purpose of the monthly reporting, the government will provide a report template for the contractor's use.

9.2 The contractor shall schedule a monthly program review. Within 10 calendar days from the beginning of the following month, the contractor shall provide the report and work with the COR to schedule a conference call. The report will contain Navy-wide data with cumulative totals and with the activities of the month along with cumulative year-to-date totals.

9.3 The contractor shall report immediately to the COR any system interruptions, including problems with CACs or laptop workstations. The contractor shall adhere to the GFE Resolution Procedures (provide upon request) in reporting the results of trouble shooting analysis.

9.4 The contractor shall quickly identify and escalate all issues and/or complaints to the COR. This includes any backlog of work due to system issues. Within 4 hours, the contractor shall escalate issue or complaints to the COR.

10.0 QUALITY ASSURANCE

10.1 The contractor's performance shall be measured on the items listed in the QASP. Customer satisfaction shall be measured by monitored telephone calls, calls passed to the CBC Liaison by the government, surveys and email messages to ensure CSRs technical competency.

11.0 HISTORICAL WORKLOAD DATA

11.1 The service population for this contract is approximately 204,000. The following information is not reflective of a

contact center operation but is provided to assist in identifying the number of personnel that may be required to perform the requirements under this PBSOW. (Please note that there is no correlation between the numbers of calls received to the number of transactions processed.)

11.2 Estimated Volume of Workload:

The below data is based on Fiscal Year 2015, unless otherwise noted:

Approximate number of total calls received by the contact center (connected to a CSR)	105,739
Approximate number of emails received/responded to	14,580
Approximate number of benefit related calls received (FEHB, FEGLI, TSP and requests for retirement information handled by CSRs)	77,257
Approximate number of non-benefit related calls received	3,586
Total number of benefit elections	122,474
Approximate number of Counselor Assisted Transactions (CAT)	22,110
Approximate number of employee self-service transactions made; approximately 13,000 of these were made during open season.	100,364
Approximate number of QC actions	1,000
Approximate number of packaged forms/mailings: TCC packages, Retirement Packages, misc. forms. Average mailing consists of 7 pages. (Use of government email is permitted)	1,100
Approximate number of form letters mailed: Carrier termination notifications (OS), LWOP letters, FEHB termination letters (nonpayment of union dues), Average mailing consists of 3 pages.	2,600
Approximate number of manually created election forms by CSR	500
Approximate number of QC follow-up actions	100
Number of documents scanned into employees eOPF	2,200

12.0 In the event a new contract is awarded to another vendor subsequent to this contract, the current contractor will

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transition work-in-progress to the new vendor. The transition plan will be a coordinated effort between the government, the current contractor and the new contractor. The government will develop a specific plan addressing transition of work shall be determined.

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ADDENDUM 1 - ACRONYMS

ADA	Americans with Disabilities Act
ADP	Automated Data Processing
BATS	Benefits Automated Tracking System (current WTS)
BENEFILES	GFSA, CSRs access to view electronic files generated from benefit elections
BENEFITS LINE	Government's toll free telephone line - used by civilian employees to reach CSRs
BENEFORMS	GFSA, that CSRs access to assist employees
BENEHITS	Benefits Human Resources Information Technology System (former WTS, discontinued as of 2/08/2016, used for historical purposes only)
BRAAT	GFSA, Benefits Reporting and Analysis Tool
CAC	Common Access Card used to access GFE
CAT	Counselor Assisted Transaction
CBC	Civilian Benefits Center - The DONs centralized benefits center attached to OCHR Norfolk Operations Center, Portsmouth, VA
CBC LIAISON	Government employee responsible for providing SOPs and resolving matters between the government staff and the contractor staff
CFR	Code of Federal Regulations
CJCSI	Chairman of the Joint Chiefs Of Staff Instruction
CO	Contracting Officer
COOP	Contingency of Operations Plan
COR	Contracting Officer's Representative
CSR	Customer Service Representative
CSRS	Civil Service Retirement System
DCPDS	Defense Civilian Personnel Data System
DCPS	Defense Civilian Payroll System
DFAS	Defense Finance and Accounting Service
DID	Direct Inward Dial
DOBF	Designation of Beneficiary Forms
DOD	Department of Defense
DON	Department of Navy
Email	Electronic Mail
ET	Eastern Time
EBIS	Employee Benefits Information System (GFSA-web Application Employees access personal and general information and to make benefit elections
e-OPF	GFSA, Electronic Official Personnel Folder
FEHB	Federal Employees Health Benefits
FEGLI	Federal Employees' Group Life Insurance
FERS	Federal Employees Retirement System
FSO	Facility Security Officer
FTE	Fulltime Equivalent Employee
GC	Government Computer
GFE	Government Furnished Equipment
GFSA	Government Furnished Software Applications

GS	General Schedule
HITS	GFSA, Human Resources Information Technology System (for reporting system problems) where contractors access and report system issues
HROs	Human Resources Offices
HRBCC	Human Resources Benefits Contact Center
HRLink	GFSA, Human Resources Link where contractors access and generate reports
HRSD	Human Resources Systems Division
IA	Information Assurance
IT	Information Technology
JPAS	Joint Personnel Adjudication System
LAN	Local Area Network
LFA	Lead Functional Assistant
NACL	National Agency Check with Local Credit Check
NIPRNET	Non-Classified Internet Protocol Router Network
NMCI	NAVY MARINE CORPS INTRANET
NT	Network
NETWARCOM	Network Warfare Command
OCHR	Office of Civilian Human Resources
OCHR-Norfolk	Office of Civilian Human Resources Norfolk Operations Center, Portsmouth, VA
OCHR-Philadelphia	Office of Civilian Human Resources Philadelphia Operations Center, Philadelphia, PA
OCHR-San Diego	Office of Civilian Human Resources San Diego Operations Center, San Diego, CA
OCHR-Silverdale	Office of Civilian Human Resources Silverdale Operations Center, Silverdale, WA
OCHR-Stennis	Office of Civilian Human Resources Stennis Operations Center, Stennis Space Center, MS
OFGLI	Office of Federal Employees' Group Life Insurance
OPM	Office of Personnel Management
OS	Open Season
PA	Privacy Act
PBSOW	Performance Based Statement of Work
PII	Personally Identifiable Information
PKI	Public Key Infrastructure
POC	Point of Contact
PPS	Ports, Protocols, and Services
PA	Privacy Act
QASP	Quality Assurance Surveillance Plan
QC	Quality Control
QLE	Qualifying Life Event
SF	Standard Form
SOP	Standard Operating Procedures
SOW	Statement of Work
TASS	Trusted Associate Sponsorship System
TCC	Temporary Continuation of Coverage
TFPS	Transaction File Print Server
TSP	Thrift Savings Plan

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TSPC	Thrift Savings Plan Catch-Up
TTY	TeleTypewriter
TDD	Telecommunication Device for the Deaf
TWMS	Total Workforce Management System
VAR	Visitor Authorization Request
VOIP	Voice Over Internet Protocol
WAN	Wide Area Network
WTS	Workload Tracking System

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