ADDENDUM NO. 1

RFP for As-Needed Off-Site Employee Benefits Call Center Services (RFPQHSS2025.O1)

June 12th, 2025

This Addendum is being issued to modify the requirements in the above-referenced Request for Proposals (RFP) and to respond to questions and requests for clarification received by or before Friday, June 6th, 2025 at 12:00 PM (PDT) (the "Deadline for RFP Questions"). Similar questions were consolidated to reduce redundancies where possible.

Please review the terms of the RFP and this Addendum carefully. If there are any inconsistencies between the RFP (issued May 20th, 2025) and the terms of this Addendum No. 1, then the terms of this Addendum No. 1 shall prevail.

Section references below are to the RFP (or Appendix thereto) and are provided for convenience or reference only.

A. Modifications to the RFP

1. **RFP Section 3.4. under Minimum Qualifications has been amended to include as follows:**

       3.4.11   Section 11: Performance Guarantees (RFP Appendix D) (word / page limit: not applicable)

Respondents shall include in their proposals performance guarantees and/or key performance indicators (collectively, "PGs") that Respondents deem appropriate to the Call Center Services solicited in this RFP.

       3.4.12   Section 12: CMD LBE Forms (available at https://sfhss.org/RFPs (word / page limit: not applicable).[1]

2. **RFP Section 3.2 (<u>Submission of Proposals</u>) has been amended to read as follows:**

    3.2   <u>Submission of Proposals</u>

       3.2.1   Respondents must submit a complete proposal with all documents below in Adobe PDF (PDF) format via email to michael.visconti@sfgov.org, cc: patrick.chang@sfgov.org, no **later than Thursday, June 26, 2025 at 12:00 PM (PT) ("Deadline for Proposals")** (*see* RFP Section 3.4. "Proposal Structure").

Respondents may combine all documents within a single combined PDF or provide separately in PDF format:

    ☐ Cover Letter (Sec. 3.4.1)

    ☐ Table of Contents (Sec. 3.4.2)

    ☐ Executive Summary (Sec. 3.4.3)

    ☐ Litigation (Sec. 3.4.4)

    ☐ Approach / Strategy to Services (Sec. 3.4.7)

    ☐ Evidence Supporting Certification of Minimum Qualifications (Sec. 3.4.8)

    ☐ Insurance (Sec. 3.4.10)

    ☐ CMD Forms (Sec. 3.4.12), available at https://sfhss.org/RFPs

---

[1] See "LBE contract requirements (CMD Attachments)" at https://www.sf.gov/resource--2022--lbe-contract-requirements-cmd-attachments.

- ☐ Vendor Response Form (Appendix A),

- ☐ Pricing Form (Appendix B),

- ☐ Standard City Agreement (Appendix C) [reviewed in accordance with Section 3.4.9.],

- ☐ Performance Guarantees (Appendix D), and

- ☐ Business Associate Agreement (Appendix E) [reviewed in accordance with Section 3.4.9.]

    3.2.2   **Reserved.** ~~Any attachments to the Vendor Response Form and Pricing Form must not exceed twenty (20) total pages (when combined with Vendor Response Form and Pricing Form PDFs) and must be submitted with the Vendor Response Form and Pricing Form.~~

3. RFP Appendix A (Vendor Response Form), item 2 has been amended to read as follows:

2.   If selected, confirm that all personnel providing services for SFHSS will be located within the ~~continental~~ United States (RFP Sec. 2.3.1).

B. Questions & Answers

1. Why do the total number of inbound calls decrease between 2021 and 2022; and again when comparing each month of available data between January - April in 2024 and the same months in 2025 (RFP Table 1: Inbound Calls by Month, page 5)?

SFHSS Response:

As pandemic era regulations began to ease during 2022, SFHSS expanded the range of approaches used to proactively engage our Members, including leveraging increased opportunities for in-person presentations to new employees and offering both virtual and in-person consultations with those preparing to retire. Additionally, the health plans SFHSS offered to Members for Plan Year 2023 saw limited changes from 2022, which may have contributed to less inbound calls requesting additional information.

For 2024 and 2025, inbound call volumes were influenced by plan changes for Plan Year 2025 for our retiree population (Medicare Plan MAPD PPO RFP for 2025 Plan Year, available at https://sfhss.org/RFPs) and a Dependent Eligibility Verification Audit that occurred during Q1 and Q2 of 2024 (see footnote #10). SFHSS has not such major plan changes for Plan Year 2026. The only benefit RFP with results effective January 1, 2026 is

the Life and Disability RFP (https://sfhss.org/RFPs) however the new carrier voluntary benefits will be administered by our third-party voluntary benefits administrator (Workterra) and calls regarding voluntary benefits have been and will continue to be directed to Workterra.

2. **Why did average speed of answering increase so significantly between 2021 and 2022 and again when comparing each month between January - April in 2024 with the same month in 2025 in RFP Table 2: Average Seed of Answer (in seconds) by Month on RFP pages 5-6?**

    SFHSS Response:

    In May of 2022, SFHSS switched phone systems to our current Cisco Webex platform which resulted in updated programming of how Average Speed of Answer (ASA) was calculated. The prior system may not have captured the same elements as the current Cisco platform, thereby calculating the ASA with different parameters. The increase in ASA from Q1 2024 to Q1 2025 can be attributed to staffing shortages, and this trend coincides with the increase in inbound calls described in the response to Question 1.

    SFHSS has recently filled most open positions for the Member Services (MBS) division, and these new employees are undergoing training in preparation to actively support call center operations. In the meantime, the ASA may fluctuate for periods when inbound call volumes increase.

3. **What percentage of calls received by the SFHSS call center are from callers who speak English? What is the procedure(s) internally for when a caller does not speak English or wishes to speak in a non-English language? What was the procedure for the incumbent external call center for non-English calls?**

    SFHSS Response:

    As the overwhelming majority of calls received are from members and retirees who speak and are able to speak to SFHSS in English, or have a relative or dependent available to translate, SFHSS does not currently track the number of calls in English versus non-English.

4. **In addition to Table 2 ("Average Speed of Answer (in seconds) by Month") on pp. 5-6 of the RFP, does SFHSS measure average hold time as well? If so, can SFHSS provide average hold time metrics for Open Enrollment in 2023 and 2024?**

SFHSS Response:

The average hold time regularly fluctuates and is influenced by variables such as staffing availability and seasonality in call volumes. However, the average hold time is never above twenty (20) minutes because SFHSS utilizes a voicemail system which turns on once that threshold is reached (*see* RFP Section 2.2).

5. **Can SFHSS provide specific examples of scenarios where a call would escalate from Level 1 to Level 2 services (RFP Section 2.3.2)? For instance, what qualifies as a "complex analytical or transactional" issue requiring MBS staff intervention?**

SFHSS Response:

In general, a call escalates from Level 1 to Level 2 when our vendor's CSR is unable to resolve a member's issue without some additional processing task (RFP Section 2.3.2. "Level 2 Services") or "analysis, collaboration and consultation with health plan and benefit vendors, internal SFHSS staff from other SFHSS divisions, and [or] analysis of People & Pay and the Case Management System (Salesforce, PeopleSoft HCM), the ECM system[.]" (*Id.*)

In addition, "appeals, troubleshooting City systems and errors" (*see* Section 2.3.2) may also result in a call escalating from Level 1 to Level 2. For example, an escalation may be necessary if there is a programming issue which would require Level 2 processing in order for the member to gain access to their online portal.

Level 1 services are predominantly the provision of established information or directing a caller to an online resource. During Open Enrollment (OE), the majority of the work will include guiding members through the benefits that are offered for the upcoming plan year, providing Members with current rates, and walking members through the online application process. All of these explanations are available either online or through the written / electronic guides otherwise available to Members.

During Open Enrollment (October) and after Open Enrollment (November and December), not all calls received are related to Open Enrollment or electing benefits for the upcoming year – or after October, to confirm benefits elected during Open Enrollment. For example, a Member may call in to report trouble accessing care. In this instance, the call would require "analysis, collaboration and consultation with health plan and benefit vendors[]" which is a "Level 2 Service" (RFP Section 2.3.2.) and would be directed back to the SFHSS MBS (Member Services) and our internal call center staff.

Similarly, a member may call about a benefit (*e.g.*, the SFHSS Surrogacy and Adoption Reimbursement Plan, available at https://sfhss.org/surrogacy-and-adoption). A Level 1 call would be directing them to that webpage if they were unable to locate it or informing the member how to submit a completed reimbursement form to SFHSS for review. A Level 2

call would be if the member required assistance completing the form or wanted a status update on a prior form submission.

6. **The RFP states that outbound calls are limited to Level 1 Service topics requiring additional research or consultation. Can SFHSS clarify the expected volume and frequency of outbound calls, and whether these are primarily follow-ups to inbound calls or proactive outreach?**

   <u>**SFHSS Response:**</u>

   The intent of SFHSS is to limit Level 1 support to only follow-ups from an initial Level 1 Member call. Call-backs for Level 1 calls are rare, as each CSR would be expected to use the available training materials to quickly and accurately respond to Level 1 questions from members while the member is still on the call. Any in-depth research would likely require either supervisor support or further review by SFHSS. However, Level 1 calls that are dropped will require a call back by CSRs. Furthermore, SFHSS may request outbound calls in response to voicemails that are Level 1 calls, but such requests would be made in accordance with overall call volumes and CSR workloads in advance with the selected Contractor's supervisor or project lead.

7. **The RFP mentions integrating contractor CSRs into the SFHSS Cisco Webex call center system. Can SFHSS provide details on the integration process, including any API requirements, training on the system, or specific configurations needed for call recording and reporting?**

   <u>**SFHSS Response:**</u>

   SFHSS previously provided the external call center vendor with the City's installers for Cisco VPN, ECM, and Jabber (though we are switching to WebEx). SFHSS will require the same for any new vendor. All other applications (e.g., Salesforce, PeopleSoft) are web-based, and, therefore, do not require integration. See Addendum 1–B (SFHSS Call Center Hardware and Software System Requirements).

8. **The RFP mentions training starting in August/September 2025. Can SFHSS provide an estimated training duration, the number of staff expected to be trained, and whether training will cover all CSRs or only supervisors in a train-the-trainer model?**

   If a vendor wishes to shadow current SFHSS staff (remotely), when will that happen?

SFHSS Response:

In the first year of our two (2) year partnership with the prior call center vendor VSA, VSA used a *train-the-trainer* approach to train the off-site call center CSRs and supervisors. Train-the-trainer instruction began in late August (8/29) and extended through the end of September (9/29).

In advance of training (early August 2023) materials such as SFHSS Member Rules (https://sfhss.org/san-francisco-health-service-system-member-rules), Section 125 Cafeteria Plan (https://sfhss.org/cafeteria-plan-2025), and other plan documents (https://sfhss.org/plan-documents), along with links to the SFHSS website and webpages containing benefit information were shared with the VSA training team (*e.g.*, https://sfhss.org/benefits/city-and-county for Active Employees) were provided to VSA. This allowed the trainers – and implementation leads – to familiarize themselves with the scope of benefits and services available to active and retired employees and their eligible dependents. In addition to providing the aforementioned materials to VSA, SFHSS provided in-house MBS call center policies, procedures and workflows, as well as de-identified transcripts of prior MBS calls as training materials both internally and to our third-party call center partner.

SFHSS does not require a *train-the-trainer* approach for the RFP Services (RFP Section 2.3.3, "Level 3 Services (Off-Site Call Center Training)"), but training of call center staff and supervisors is required. SFHSS expects each Respondent to include in its proposal its approach to Level 3 Services and associated costs if billed separately from Level 1 Services (Section 2.3.1).

9. **Can SFHSS provide a detailed list of security protocols or certifications (e.g., SOC 2, ISO 27001) required for handling Protected Health Information (PHI) beyond HIPAA compliance?**

SFHSS Response:

In addition to HIPAA compliance, the standard City terms and conditions include Section 13.6 (American Institute of Certified Public Accounts (AICPA) Audit Reports) that a Contractor shall provide to the City "on an annual basis, an SSAE 18, SOC 2, Type 2 Report, and an SSAE 18, SOC 1, Type 2 Audit Report," (as applicable).

For the prior agreement for As-Needed Off-Site Call Center Support Services between the City and vendor, the vendor was required to complete the City's Cybersecurity Risk Assessment or CRA. Vendor's will be asked to submit information to support the CRA review in two (2) ways:
   i.   Completing a CRA Questionnaire (see RFP Appendix F posted to sfhss.org/RFPs)
   ii.   Submitting a SOC 2 Report

If opting to provide a SOC 2 Report directly (option ii), SFHSS will require a signed Non-disclosure Agreement (NDA) (see RFP Appendix G, posted to sfhss.org/RFPs).

Please be advised that if a selected Respondent is unable to complete a CRA and SFHSS is unable to secure a waiver (which is not guaranteed), this may trigger RFP Section 4.6 (Contract Negotiation) and "SFHSS, in its sole discretion, may terminate negotiations with the highest-ranked Respondent and begin contract negotiations with the next highest ranked Respondent."

In addition, if employees of the selected Respondent utilize their own personal devices to access City systems, these devices must have end-point security to protect against malicious threats.

10. **Are there specific encryption standards or data retention policies for call recordings and screen captures that the contractor must follow?**

SFHSS Response:

Per HIPAA, any Protected Health Information (PHI) should be encrypted in transit and at rest, with encryption standards that meet or exceed US standard encryption definitions.

The selected Respondent shall retain recordings of any materials created in the performance of the Services for one (1) year from the termination of the agreement with the City (SFHSS). The selected Respondent shall make all records and recordings available for inspection by SFHSS, the City or a third-party auditor upon request (*e.g.*, appeals, disputes, investigations, audits).

11. **Is there a current off-site third-party call center? Which firm(s) has or have provided off-site call center support to SFHSS previously? How did SFHSS select this/these prior firm(s)?**

SFHSS Response:

SFHSS has no current third-party call-center support services.

SFHSS has had one (1) prior agreement for as-needed third-party call center support services with Valerie Schlitt Associates Incorporated dba VSA, Inc. (https://www.vsaprospecting.com/). This agreement ended on December 31, 2024. No additional amendment or extension was permitted per the terms of the waiver provided in 2023 by the City and County of San Francisco Civil Service Commission (CSC). Please refer to RFP Section 1.2.2 (SFHSS Call Center History) for more information. VSA, Inc. is designated "VSA" in the RFP.

VSA met the terms of the agreement between the City and County of San Francisco for the San Francisco Health Service System (SFHSS) and VSA (dated September 1, 2023 through December 31, 2024, as amended). This agreement had a finite term per the terms of the approval received by SFHSS from the CSC (May 1, 2023, PSC (personal service contract) number 47934 – 22/23, available at https://media.api.sf.gov/documents/5-6-24_Item_8_SFHSS_Hiring_Progress_in_the_Member_Services_Division.pdf).

SFHSS selected VSA following a competitive procurement (RFP) As-needed Off-site Employee Benefits Call Center Services (RFPQHSS2023.O1), *available at* https://sfhss.org/RFPs.

PLEASE BE ADVISED that similar to the 2023 Agreement between the City and VSA, and per the terms of the RFP: "[a]pproval of a contract resulting from this RFP and/or any extension beyond the initial proposed term of eighteen (18) months is contingent upon approval by the Civil Service Commission (https://www.sf.gov/departments--civil-servicecommission)." RFP preamble (p.1).

12. **Is this RFP a reissue of competitive procurement (RFP) "As-needed Off-site Employee Benefits Call Center Services" (RFPQHSS2023.O1), available at https://sfhss.org/RFPs? Or is this a new competitive procurement (RFP)?**

    <u>**SFHSS Response:**</u>

    This is a new and separate RFP from the prior competitive procurement (RFP) As-needed Off-site Employee Benefits Call Center Services (RFPQHSS2023.O1) in 2023, available at https://sfhss.org/RFPs. See our response to Question 11.

13. **Our call-center agents (CSRs) are located in the continental United States. Are CSRs the only service providers that must be located within the continental United States? What about implementation or technical support? What about CSRs or call center staff or supervisors located in a U.S. Territory like Puerto Rico?**

    <u>**Please see Addendum Section A.3. above and the removal of the descriptor "continental".**</u>

    <u>**SFHSS Response:**</u>

    All Services (see RFP Section 2.3 "Scope of Services") must be provided by staff located solely within the United States.

    See RFP Section 2.3.1 **(Level 1 Services),** including subsection c) <u>Secure and Remote Working Environment</u>: "Respondents acknowledge Services, including Level 1 Services and implementation require interaction with City's sensitive and protected information.

The selected Respondent must ensure that all Services are provided by their staff located solely within the ~~continental~~ United States. The selected Respondent..." (emphasis added)

See also Appendix A – Vendor Response Form, Question 2: "If selected, confirm that all personnel providing services for SFHSS will be located within the ~~continental~~ United States (RFP Sec. 2.3.1)".

U.S. Territories: If a Respondent is planning to utilize a call center, supervisors, CSRs or other staff located in Puerto Rico or another U.S. Territory or the District of Columbia, the contract award will be contingent upon review and approval of the City's Department of Technology and Information Services (TIS) and the Cybersecurity Risk Assessment (CRA) which is required regardless of geographical location for each Respondent.

14. **Is a single U.S. location acceptable, or do you prefer geographical diversity for business-continuity purposes?**

    SFHSS Response:

    SFHSS does not require geographic diversity of CSRs. CSRs and any backups must meet the stated Hours of Operation (RFP Section 2.5.5).

15. **Will the completed IRS W-9 form, required in our RFP response in RFP Section 3.4.3. (Executive Summary) count against the word/page limit of 1,000 words or two (2) pages)?**

    SFHSS Response:

    No, the submitted IRS W-9 will not count towards the word/page limit for RFP Section 3.4.3. (Section 3 (Executive Summary)).

16. **Is there a City and County of San Francisco Contract Monitoring Division (CMD) Local Business Enterprise (LBE) subcontracting requirement? Will an LBE prime bidder be eligible for a bonus or bid discount? May a prime contractor/bidder subcontract services? Where in the administrative code are the rules for LBE prime contractor/bidders receiving bid discounts?**

    SFHSS Response:

    There is no Contract Monitoring Division (CMD) Local Business Enterprise (LBE) subcontracting requirement for this RFP. SFHSS received a waiver from CMD (14BPREBID0002490). However, SFHSS and the City and County of San Francisco

strongly encourage responses from qualified Local Business Enterprises (LBEs) (see RFP Sec. 4.7.21 "Local Business Enterprise").

Prime Bid Discounts will be in effect for any Respondent certified as a Small- or MicroLBE and proving a Commercially Useful Function (see San Francisco Administrative Code, Section 14B.2. "DEFINITIONS"; see also Section 14B.7. "PRIME CONTRACTS", available at https://codelibrary.amlegal.com/codes/san_francisco/latest/sf_admin/0-0-0-9440, for more information, including, but not limited to subsection (D) "Contracts Subject to Prime Bid Discounts" and (E) "Amount of Discount").

Pursuant to Sec. 4.3 (Subcontracting) of the Professional Services Agreement (see RFP Appendix C - Professional Services Agreement), any prime contractor may subcontract portions of the Services in this RFP upon prior written approval of the City. In addition, all subcontracts approved by the City must meet all contract terms of this RFP, including that all services must be performed by individuals located in the United States.

For more information on CMD or LBE firms and obtaining LBE status, please go to the Contract Monitoring Division (CMD) webpage at http://sfgov.org/cmd/ or contact CMD via email at cmd.info@sfgov.org.

17. Is the anticipated budget of $502,000 an annual cap, full-term cap, or planning estimate subject to adjustment after call-forecast finalization?

SFHSS Response:

The Anticipated Budget (RFP preamble, page 1) is based on the current budget submission for this project for the full estimated (initial) term of approximately eighteen (18) months (from July 2025 through December 2026) or two (2) Open Enrollment cycles. This budget may be modified by the Civil Service Commission if the Civil Service Commission approves a waiver as it did in 2023 for the prior RFP (expected decision by or before July 7, 2025). SFHSS may request an increase to this amount as part of our budget submission for FY2026-2027. This process occurs on or around February - June 2026.

18. The RFP mentions diverse language needs (e.g., Spanish, Mandarin, Cantonese, etc.). Can SFHSS specify the expected percentage of calls requiring non-English language support? How did the prior off-site call center vendor handle non-English language calls?

SFHSS Response:

The prior off-site call center vendor (VSA) used LanguageLine for non-English calls. VSA possessed their own LanguageLine subscription / membership.

However, as the overwhelming majority of calls received are from members and retirees who speak and are able to speak to SFHSS in English, or have a relative or dependent available to translate, SFHSS does not track calls by language spoken (by the caller) or preferred language. See also the response to Question 3 above.

19. *__Peak Call Periods__*. **Beyond the Open Enrollment period, can SFHSS provide more details on the expected duration and intensity of other peak call volume periods (e.g., June/July for retirements, November/December for processing)?**

    __Staffing Estimates__. **Are these periods expected to require the same level of staffing as Open Enrollment?**

    __Soft-Launch or Peak Volume Start Date (2025)__. **Will SFHSS require a soft-launch with the selected Repondent prior to October 1st and Open Enrollment? When will Level 1 Service calls be automatically routed to the selected vendor?**

    SFHSS Response:

    Peak Call Periods. SFHSS does not expect to require third-party call center services outside of the peak Open Enrollment period (just prior to, during, and in the two months after Open Enrollment). The exact Open Enrollment dates are set for this year from October 1 – October 24..

    Staffing Estimates. Please see Addendum Section 1-A for the number of VSA (third-party vendor for 2023 and 2024) CSRs from September 3, 2024 through November 27, 2024. The highest number of CSRs during that period was 15, the lowest in a given day was 9, and the average during that period was 10.85.

    Soft-Launch or Peak Volume Start Date (2025). Call volumes this year may require starting services a week or two prior to October 1st. These weeks may also be used for production testing and/or to "soft launch" the off-site call center prior to the highest volume period (October 1st - October 24th). After Open Enrollment closes, there will be a high volume of Level 2 Services (RFP Section 2.3.2) for in-house MBS call center staff, including processing of elections made during Open Enrollment. As such, due to the assignment of in-house staff to Level 2 Services, SFHSS may continue to require Level 1 Services (2.3.1) from the selected off-site call center vendor partner at least through November 26.

20. **RFP Section 2.3.1 "Level 1 Services" regarding Call Answering states, "The selected Respondent must guarantee that all inbound calls answered by Contractor from Members shall be taken by a live operator employed by Contractor." Are you still allowing for voicemails to be left and returned?**

SFHSS Response:

The only voicemail will be that of SFHSS, and it will only be turned on in the unlikely event that the combination of in-house SFHSS MBS staff and the CSRs of the selected Respondent, are unable collectively to handle the volume of incoming calls. In 2023 and 2024, if a Level 1 call was routed to VSA, it remained in VSA's queue until answered by a CSR.

However, SFHSS explored the option to set a timeout where if a call routed to VSA's queue was not answered within a specific set time, it would either A) goes to voicemail directly (SFHSS' voicemail), or B) get routed back to SFHSS' Member Services queue. This option was never exercised as VSA CSRs proved capable of handling all Level 1 calls or calls requiring escalation back to SFHSS MBS with manageable call wait times.

21. **To confirm, will the contractor provide Level 1 Services and Level 3 Services only?**

    SFHSS Response:

    Confirmed.

22. **Regarding RFP Section 2.3.2 "Level 2 Services", you state that "Full-time MBS Staff will continue to provide Members with Level 1 Services (depending on SFHSS internal call volumes and /or in-person appointment calendars) and all Level 2 complex administrative, transactional and analytical work." What are full-time MBS staff responsible for compared to what the vendor is responsible for? Are MBS staff the first to answer calls?**

    SFHSS Response:

    The selected Respondent is expected to provide Level 1 Services as described in RFP Section 2.3.1. The SFHSS MBS Call Center will provide Level 2 Services, but may also provide Level 1 Services as described in RFP Section 2.3.2.

    As per RFP Section 2.1.1 (Inbound Calls) "The selected Contractor will receive inbound calls solely from Members based on their progression and selection(s) through the City's interactive voice response (IVR) system and in accordance with the scope of work. In the event a caller is routed to the selected Contractor, Contractor will ensure that a live, fully trained, customer service representative (CSR) will serve as the initial contact for all calls.

23. **What is the difference in the meaning of metrics "calls received" versus "calls handled" (RFP Section 2.2. "Current MBS Call Operations and Backlog and Reallocation of Resources")?**

How do these metrics correspond with high volume periods - when looking at Table 1, June and July are considered "high volume" months, but in 2024 the inbound call metrics for these months do not appear to be any higher than most other months? Is "high volume" determined based on a different metric than total inbound calls?

The Current MBS Call Operations Table (RFP Section 2.2) lists the number of voicemails received each month, how many voicemails are actually handled each day and/or month? How many outbound calls are made each month?

<u>SFHSS Response:</u>

When a caller dials the SFHSS 800-number, the caller is greeted with a prompt. The caller is asked to select one of several options, at which point the call is placed in the call center queue.

When SFHSS has an off-site third-party call center, certain prompt selections route the call directly to the third-party call center. Other selections route the call to the SFHSS in-house MBS call center queue. This is how SFHSS automatically separates Level 1 from Level 2 service calls.

"Received Calls" are inbound calls where a caller has made an IVR selection. "Handled Calls" are inbound calls where the caller speaks with an SFHSS in-house MBS call center staff member live.

Please see RFP Tables 1-3 for a month-by-month breakdown of available internal MBS call center data. High-volume periods have historically been between the months of October and December (Open Enrollment and post-Open Enrollment processing) and June and July (when the greatest number of employees retire across the City and require assistance from SFHSS as they transition from active member to retiree status).
All relevant and available call center data has been provided across RFP Tables 1 - 3 and in Section 2.2. SFHSS understands that there may be slight variations in collected call center data due to the volume of calls received.

24. **The annual report also mentions the manual entry of 23,092 paper enrollments - is this a task that call agents under this call center contract would be responsible for?**

    <u>SFHSS Response:</u>

    No. These are considered Level 2 Services as described in RFP Section 2.3.2 and are handled entirely by SFHSS MBS staff.

25. **RFP Section 2.6 "Additional Requirements and Responsibilities", can you clarify the recording requirements?**

SFHSS Response:

As stated in the RFP, "In the instances when City systems, including but not limited to the SFHSS website (https://sfhss.org/), are being accessed and used to provide Services to Members, the selected Contractor shall accompany all audio recordings with screen capture recordings to assist with future training of the selected Contractor's CSRs and staff." SFHSS will coordinate with the selected Respondent on our preferred file format and delivery schedule for recordings of Member interactions.

26. **What is the current length of training in hours, classroom time only, not including nesting/on-the-job training (OJT)? What is the length of time an agent spends in nesting/OJT in hours after leaving the classroom? Can an agent profile/job description be provided?**

    SFHSS Response:

    In both 2023 and 2024, CSRs received between 50 and 60 hours of training prior to Services go-live each year. SFHSS does not do 'nesting' (also known and described in this addendum as shadowing). SFHSS is also amendable to and has previously used a *train-the-trainer* model.
    SFHSS is not responsible for hiring CSRs (third-party call center customer service representatives). However, the job description of an MBS staff member who is a 1209 Benefits Technician and is assigned to the in-house call center can be located on the City's SF Careers website at https://careers.sf.gov/classifications/?classCode=1209.

27. **What are the payment terms, as it was not clear in the provided SOW?**

    SFHSS Response:

    Please see RFP Appendix C, Section 3.3.8 (Payment Terms.)

28. **Are a selected Respondent's customer service representatives (CSRs or agents) expected to be dedicated exclusively to SFHSS during the Hours of Operation (2.5.5)?**

    SFHSS Response:

    No.

29. **Can our agents be located in a work-from-home environment?**

SFHSS Response:

Yes.

30. **Should vendors cost an ACD solution, including voice and screen recordings, or will SFHSS extend your Cisco solution?**

SFHSS Response:

SFHSS's preference is to extend our Cisco platform. This ensures integration in a timely manner.

31. **What are the background requirements for agents in order to access your systems and data? If drug testing is required, what type of test is administered, and is it completed once or on a random, ongoing basis?**

SFHSS Response:

To gain access to our systems and data, every employee or contractor of the selected Respondent/Contractor will be required to review and/or sign the following:
1. Acceptable Use Policy
2. CCSF Cybersecurity Policy
3. Data Classification Standard
4. HR-Systems Confidentiality Form
5. HSS Health Information Confidentiality Agreement
6. People & Pay Security Access Form
7. SFHSS Confidentiality Acknowledgement

For ease of reference, 1-7 have been combined in Adobe PDF and uploaded to https://sfhss.org/RFPs as RFP Appendix H.

32. **What is the lead time required (if any) to generate training system credentials for agents?**

SFHSS Response:

One week is the normal lead time to have credentials assigned in the system. Name, complete social, phone / address (can be employer's contact info), and email must be provided.

33. **What is your expected forecasting process for a new vendor to determine staffing levels, and when do you "lock" it?**

SFHSS Response:

Based on our prior contract with VSA, staffing levels were reviewed weekly. If the call volumes for a given day fell below the forecast, staff levels were adjusted. If the call volumes for a given day exceed the forecast, our prior vendor (VSA) would place first line supervisors on phones.

34. **Can the PC/Desktop specifications be provided (for instance, i5 chipset, 8GB ram, dual 21' monitors)?**

    SFHSS Response:

    See Addendum 1–B (SFHSS Call Center Hardware and Software System Requirements).

35. **Please describe in detail how the vendor will connect to SFHSS systems and applications, and specifically who is providing what (VPN, Thin Client, Call and Screen recordings, etc.).**

    SFHSS Response:

    The VPN, VOIP, and ECM client will be provided by SFHSS. All other software applications are web-based. Call recording is done in the Cisco system. SFHSS does not record screens.

36. **In Table 1 of the RFP, you provided Inbound call by month; can you break this down by weeks for the weeks in 2025 and 2026 where you would engage the vendor and provide how much of the volume you would handle internally vs passing over to the vendor?**

    SFHSS Response:

    We are unable to provide weekly call center statistics.

37. **RFP page 11 of 34, item d) "High-Speed Internet Connectivity" refers to 30 Mbps, symmetrical, for "staff". What is the estimated bandwidth used per CSR? Does SFHSS have bandwidth specifications for CSRs that work from home?**

    SFHSS Response:

    The selected Respondent's connection must be able to handle VOIP voice data with no impact to call quality, while simultaneously being able to access multiple websites (i.e.,

---

Salesforce and PeopleSoft) and potentially accessing the ECM client. The City estimates that any CSR would have at least a 10Mbps connection for call data, with a minimum of 30Mbps for all other data. This is per user on any system. See Addendum 1–B (SFHSS Call Center Hardware and Software System Requirements).

38. Regarding RFP page 11 and 12 of 34, item e) "Technical Requirements", Does SFHSS have PC specifications for each CSR's PC Setup (i.e., processor model, RAM volume, SSD volume, size of monitor, quantity of monitors, etc.)?

SFHSS Response:

See Addendum 1–B (SFHSS Call Center Hardware and Software System Requirements).

39. Regarding RFP page 13 of 34, item 2.4.4 "Technology Setup", can SFHSS define and detail what is meant by Respondent will set up "technological infrastructure" as it pertains to securing access to the City System? Does this mean that the Respondent must deliver private MPLS circuits to the SFHSS data centers? Or does this just refer to the technology required to set up a VPN to SFHSS and create a secure HIPAA environment for the Respondent's CSRs?

SFHSS Response:

For VOIP Call software (Jabber/WebEx) the estimate is that each CSR would have at least a 10Mbps connection for call data, with a minimum of 30Mbps for all other data. This is per user on any system. See Addendum 1–B (SFHSS Call Center Hardware and Software System Requirements).

40. Can SFHSS define and detail what is meant by "necessary integrations"?

SFHSS Response:

Please refer to Addendum 1–B (SFHSS Call Center Hardware and Software System Requirements).

41. Regarding RFP page 13 of 34, item 2.4.4 "Technology Setup", can SFHSS define and detail what SFHSS systems require APIs and what type of APIs are supported?

SFHSS Response:

No APIs are required by the vendor.

42. **Regarding RFP page 14 and 15 of 34, item 2.6.1 "Data Tracking, Reporting and Call-Recording", since the Contractor's CSRs are on the SFHSS Cisco Webex Contact Center, is SFHSS responsible for providing the Cisco Webex Contact Center Screen Capture software on the CSRs' PCs?**

SFHSS Response:

SFHSS will provide access to the Cisco platform. SFHSS does not screen capture.

43. **Regarding RFP page 14 and 15 of 34, item 2.6.1 "Data Tracking, Reporting and Call-Recording", since the Contractor's CSRs are on the SFHSS Cisco Webex Contact Center system, will SFHSS provide the Contractor access to the SFHSS Cisco Webex Contact Center system to pull the "regular reports" described?**

SFHSS Response:

Yes, VSA was provided access to Supervisor view and received automated reports.

44. **Who is responsible for the after-call surveys mentioned on page 15 of the RFP?**

SFHSS Response:

The selected Respondent to this RFP is responsible for after-call surveys, and SFHSS expects each Respondent's proposal to include its approach to quality control and management, including, but not limited to caller surveys.

Between 2023 and 2024, our prior vendor VSA had a Quality Assurance (QA) checklist that they completed. SFHSS provided VSA with 10% of the calls taken by their staff, from which they would listen to the calls and then evaluate whether the call services provided met the quality expectations established in coordination with SFHSS.

In addition, SFHSS MBS senior staff and managers conducted call reviews separately from VSA, including, but not limited to calls where SFHSS MBS staff received a complaint about the accuracy or completeness of information shared on a Level 1 Service call.

The remainder of this page intentionally left blank.

Addendum 1-A
Count of VSA Agents by Day (September 2024 – November 2024)[2]

Date	N	Date	N
9/3/2024	9	10/17/2024	14
9/4/2024	9	10/18/2024	13
9/5/2024	9	10/21/2024	14
9/6/2024	9	10/22/2024	14
9/9/2024	9	10/23/2024	13
9/10/2024	9	10/24/2024	15
9/11/2024	9	10/25/2024	14
9/12/2024	9	10/28/2024	12
9/13/2024	9	10/29/2024	12
9/16/2024	9	10/30/2024	13
9/17/2024	9	10/31/2024	13
9/18/2024	9	11/1/2024	13
9/19/2024	9	11/4/2024	10
9/20/2024	9	11/5/2024	10
9/23/2024	9	11/6/2024	9
9/24/2024	9	11/7/2024	11
9/25/2024	9	11/8/2024	10
9/26/2024	9	11/12/2024	9
9/27/2024	9	11/13/2024	9
9/30/2024	15	11/14/2024	9
10/1/2024	14	11/15/2024	9
10/2/2024	15	11/18/2024	9
10/3/2024	15	11/19/2024	9
10/4/2024	15	11/20/2024	9
10/7/2024	12	11/21/2024	9
10/8/2024	13	11/22/2024	9
10/9/2024	12	11/25/2024	9
10/10/2024	12	11/26/2024	9
10/11/2024	12	11/27/2024	9
10/15/2024	14	**Avg. Number of Agents**	**10.85**
10/16/2024	13		

---

[2] *Does not reflect occasional instances of VSA being notified midway through a given day that due to low call volumes, CSR could be reassigned to another client; does reflect instances of VSA supervisors answering calls (counted here as a CSR) during high-volume periods.

Addendum 1-B
SFHSS Call Center Hardware and Software System Requirements

RFP Respondents are required to ensure that all Call Center Hardware and Software Requirements are implemented prior to the go-live of Services. The time and costs associated with implementing the required Call Center Hardware and Software Requirements are the full responsibility of the selected RFP Respondent. While SFHSS understands that such costs may be directly or indirectly incorporated into RFP Appendix B (Pricing for Services Form), costs for Call Center Hardware and Software Requirements (below) will not be reimbursed separately by SFHSS.

I. **VPN Client (Cisco AnyConnect).**

    a. Supported on Windows 10 and 11 (TPM-enabled devices)

        1) Windows devices must be running on systems that include Trusted Platform Module version 2.0

    b. MacOS 11, 12, 13, and 14 (TPM-enabled devices)

        1) Mac OS devices must be running on systems that include a Secure Enclave such as MacBook Pro computers with Touch Bar (2016 and 2017) that contain the Apple T1 chip

        2) Intel-based Mac computers that contain the Apple T2 Security chip, or Mac computers with Apple silicon

II. **ECM (Perceptive Content Client - ImageNow).**

    a. Hardware Processor

        1) Requires a 2.0 GHz or greater processor. A dual core processor is recommended for increased performance.

        2) Memory 2 GB

    b. Screen Resolution:

        1) The required minimum screen resolution is 1024 x 768. A 1280 x 1024 SVGA screen resolution is recommended. Dual monitors are supported.

    c. Operating Systems Microsoft Windows 10 and 11

        1) Mac OS is not supported

    d. Minimum bandwidth requirements

   1) 1.5 Mb connection is required. A 4.5 Mb connection is recommended

III.   <u>**WebEx Desktop (Soft Phone Software).**</u>

  a. Processor: Intel Dual-Core CPU 2.XX GHz or AMD processor.

  b. Memory (RAM): 4 GB minimum recommended.

  c. Operating System (Windows): Windows 10 or later, with 64-bit being the only supported version.

  d. Operating System (Mac): Mac OS X 10.13 or later.

  e. Browsers: JavaScript and cookies must be enabled. Java is not needed for Mozilla Firefox and Google Chrome users.

  f. Microsoft Edge WebView2 component: This helps with bandwidth and memory.

IV.   <u>**Cisco WebEx Contact Center (Web Based Software).**</u>

  a. System requirements
   1) Memory—2GB overall application RAM, excluding the operating system allocation.

  b. Operating system
   1) Windows 10 or Windows 11

   2) MAC OS 10.12, 10.13, or 10.14

Operating System	Browser Version
Windows 10	• Google Chrome V76.0.3809 and later • Firefox Extended Support Release (ESR) V68 and later • Edge Chromium (MS Edge V79 and later)
Windows 11	• Google Chrome V103.0.5060.114 and later • Firefox Extended Support Release (ESR) V102.0 and later) • Edge Chromium (MS Edge V103.0.1264.44 and later)
macOS	• Google Chrome V76.0.3809 and later • Firefox Extended Support Release (ESR) V68 and later) • Edge Chromium (MS Edge V79 and later)

  c. Make sure the following browser settings are configured:
   1) Cookies and site data are enabled.

2) Security level is set to Medium.

3) Pop-up blocker is disabled.

4) JavaScript is enabled.

V. **Screen resolution.**

    a. The Desktop display size must be greater than 500 x 500 pixels (width x height). You must set your web browser zoom to 100% for the best experience.

VI. **Responsiveness.**

    a. The title and logo aren't displayed when the viewing area is fewer than 736 pixels wide. Increase the width to 737 pixels or more to view the logo and the title.

    b. If the viewing area is less than 1280 pixels wide, the task list appears on top of the task page and the interaction control pane. Collapse the task list to view the interaction control pane.

VII. **Bandwidth requirements.**

The bandwidth requirements are as follows:

    a. Optimal performance—Requires a high-speed internet connection with a minimum recommended network bandwidth of 512 kbps (kilobits per second).

    b. Data payload requests—The data payloads range from 1-100 kbps on average, and at the peak, the value ranges 2–3 MB.

Data payloads vary based on the nature and frequency of activities and requests.