Notice of Request for Proposal (RFP)
Call Center Platform Replacement

Alameda Alliance for Health
1240 South Loop Road
Alameda, California 94502
Email: **VendorManagement@alamedaalliance.org**

Timeline

Item	Due Date
RFP Issued	May 1, 2026
RFP Responses Due (*no exceptions*)	June 1, 2026
Finalist Selection	June 12, 2026
Finalist Interviews and Presentations	June 15, 2026, through July 17, 2026

Please Note: Alameda Alliance for Health (Alliance) reserves the right to amend the RFP requirements and timetables to waive non-conformities, and to reject proposals. The final scope of work is subject to negotiation between the Alliance and the chosen vendor.

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I. Summary

A. Project Definition

The Alameda Alliance for Health (Alliance, Plan) is soliciting proposals from qualified vendors to provide a modern, secure (HIPAA-compliant), enterprise-grade call center platform to replace the Alliance's existing call center systems. The proposed solution must be cloud-based and include all required software, licensing, hosting, implementation services, vendor support, and ongoing maintenance.

This procurement is limited to technology solutions only and expressly excludes call center staffing, workforce augmentation, or outsourced call center operations.

II. The Alliance Background Information

A. Overview

The Alliance is a local, public, not-for-profit managed care health plan committed to making high-quality health care services accessible and affordable to Alameda County residents. Established in 1996, the Alliance was created by and for Alameda County residents. The Alliance Board of Governors, leadership, staff, and provider network reflect the county's cultural and linguistic diversity. The Alliance provides health care coverage to more than 400,000 children and adults with limited resources through a National Committee on Quality Assurance (NCQA) accredited Medicare, Medi-Cal, and Alliance Group Care program (an employer-sponsored plan that provides affordable, comprehensive health care coverage to In-Home Supportive Services (IHSS) workers in Alameda County). On Thursday, January 1, 2026, the Alliance began to offer a Health Maintenance Organization (HMO) Dual Eligible Special Needs Plan (D-SNP) to members. The new plan is called Alameda Alliance Wellness. The Alliance provides health care coverage for 1 in 4 Alameda County residents in partnership with a network of more than 10,000 physicians and specialists, hospitals, and pharmacies.

The Alliance's primary operating income is from government funding. Investment income is the Alliance's other non-operating income. The Alliance has fixed assets, including an office building and IT hardware.

As a public and not-for-profit organization, the Alliance must work to adhere to the State of California's healthcare regulations and legislation, as it is a government-controlled entity. In the last five years, the Alliance has grown and changed, including new state programs, new reporting requirements, new products (including a Medicare D-SNP program), and growth of membership and staff.

B. Programs

Alliance Group Care

Alliance Group Care provides low-cost health care coverage to IHSS workers in Alameda County. Benefits include routine care from a primary care physician, specialty care, hospital care, and other services.

IHSS home care workers may qualify for Alliance Group Care through the Alameda County Public Authority for IHSS.

Alliance Medi-Cal

Medi-Cal is a state-sponsored health insurance program administered through the Alliance.

Medi-Cal provides comprehensive health care coverage for those who meet income guidelines, including:

- Adults who meet income requirements
- Families and children
- People with disabilities
- Seniors

Alameda Alliance Wellness

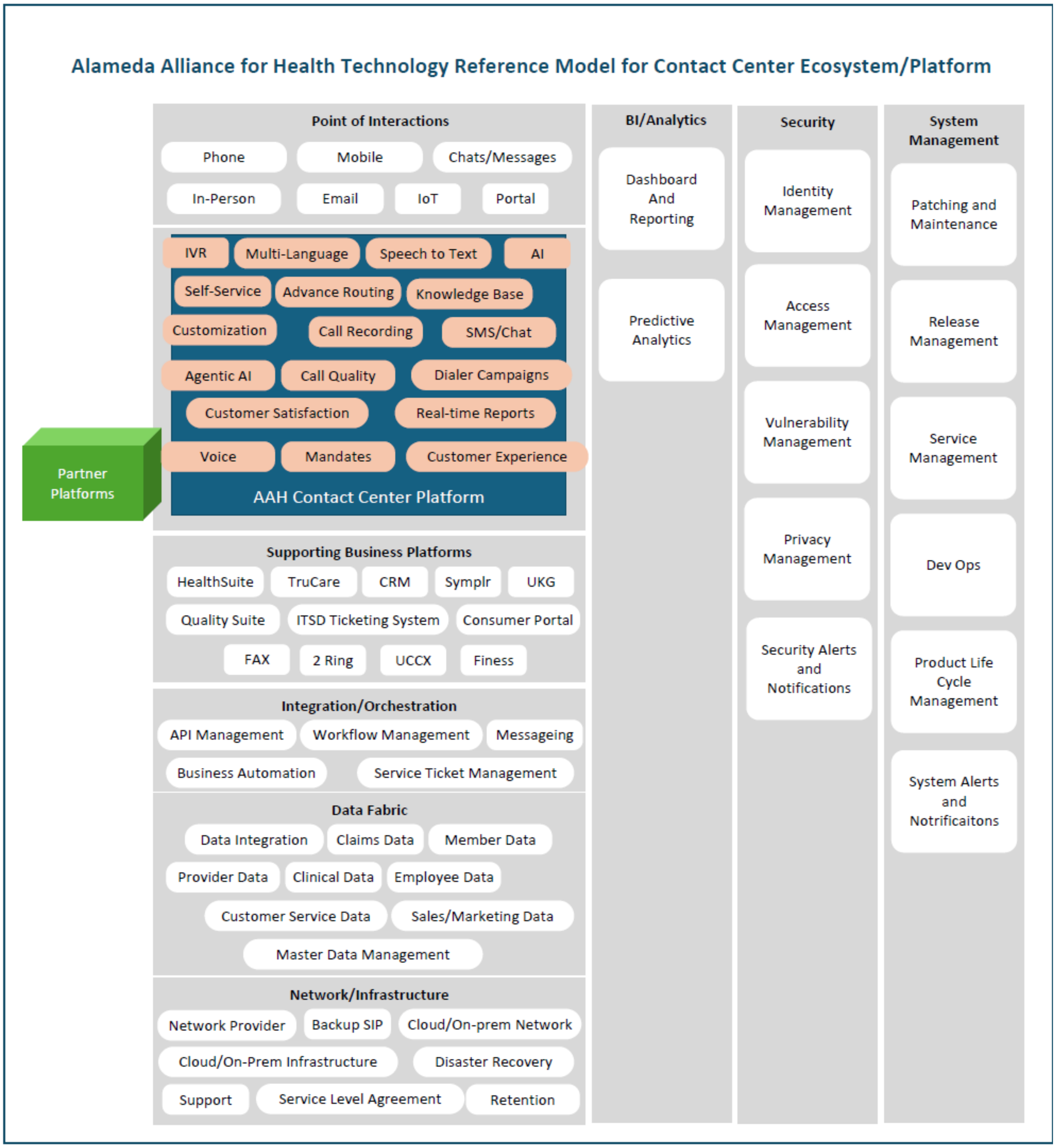
On Thursday, January 1, 2026, the Alliance expanded to offer Medicare D-SNP to Alameda County residents who are dually eligible for Medicare and Medi-Cal. The addition of the Medicare line of business will offer care coordination and wrap-around services.

C. Goals

The Alliance seeks a call center platform vendor capable of delivering a highly scalable, resilient, and fault-tolerant solution to support both current and anticipated operational requirements. The primary objective of this Request for Proposal (RFP) is to procure a secure, cloud-based call center platform to replace the Alliance’s existing telephony infrastructure.

The Alliance requires a solution that supports omnichannel communications across voice and digital channels; integrates with existing enterprise systems (including the Plan’s existing and future customer relationship management (CRM) system, member and provider portals, and reporting platforms); and complies with applicable healthcare regulatory, privacy, and security requirements. The proposed platform must deliver high availability and disaster recovery capabilities, robust monitoring and reporting functionality, and configurable workflows to support operational scalability, programmatic changes, and evolving member and provider communication needs.

D. Proposed Ecosystem



III. Desired Services

The selected vendor will provide a turnkey call center software solution, including licensing, configuration, implementation, system integration, data migration, training, documentation, and ongoing vendor support.

A. Core Platform Capabilities

- Inbound and outbound voice
- Interactive Voice Response (IVR) with configurable call flows
- Skill-based and rules-based routing
- Queue management and callback functionality
- Call recording, monitoring, and playback
- Omnichannel support: chat, secure messaging/email, Short Message Service (SMS) (optional)

B. Administration and Configuration

- Web-based administration and configuration tools
- Role-based access controls
- Non-technical workflow configuration
- Support for multiple queues, departments, and lines of business

C. Technology and Architecture Requirements

1.1. Cloud Architecture

- Multi-tenant or dedicated cloud architecture
- Hosting within the United States
- High availability and fault tolerance
- Automatic updates and patching

1.2 Integration Capabilities

- Integration capabilities with existing plan systems, including its current CRM and case management tools
- APIs for real-time and batch data exchange
- Support for HL7/FHIR where applicable
- SSO and identity management integration

1.3 Reporting and Analytics

- Real-time dashboards
- Historical reporting
- Exportable data and API access
- Custom report creation (ideally by the end user)

1.4 Security and Privacy

- Compliance with HIPAA and HITECH, including implementation of administrative, physical, and technical safeguards to protect the confidentiality, integrity, and availability of protected health information (PHI)
- Encryption of data in transit and at rest using industry-standard encryption protocols and key management practices
- Independent third-party penetration testing conducted at least annually, with documented remediation of identified vulnerabilities

SOC 2 Type II certification or equivalent independent security attestation, demonstrating the effectiveness of security controls over time.

1.5 Business Continuity and Disaster Recovery

- A formally documented Disaster Recovery (DR) plan, covering incident response, system failover, recovery procedures, and communication protocols
- Clearly defined Recovery Time Objective (RTO) and Recovery Point Objective (RPO) targets for all critical system components
- Geographically redundant data centers or availability zones designed to support high availability and fault tolerance

Regular Disaster Recovery testing, conducted at least annually, with documented test results and remediation activities.

D. Implementation and Migration

The proposals must provide a comprehensive, end-to-end implementation and migration plan that addresses all phases of deployment, including but not limited to discovery and requirements validation, call flow and routing design, number porting, system configuration, integration, testing, training, production cutover, and post-implementation stabilization. The plan must demonstrate the bidder’s ability to deliver a controlled transition with minimal service disruption and clearly define roles, milestones, dependencies, and success criteria.

E. Vendor Support and SLAs

Given the mission-critical nature of telephony services, the vendor must demonstrate a mature, highly responsive support and service delivery model designed to ensure continuous system availability and rapid issue resolution.

At a minimum, the vendor must meet the following requirements:

- Defined and contractually enforceable system uptime Service Level Agreements (SLAs), including availability targets for core telephony services and any customer-facing components, including:
    - Requirement for 24x7 support for critical (Severity 1) telephony incidents
    - Monthly SLA performance reporting, including uptime, incident volume, root cause summaries, and corrective actions
    - Defined service credits or financial remedies for sustained SLA failures
- Clearly defined vendor support hours and escalation paths, including tiered escalation procedures for critical incidents impacting call routing, call quality, or system availability
- Documented incident response and resolution timelines, with priority classifications and target response and restoration times appropriate for a healthcare contact center environment
- Transparent release management and product roadmap communication, including advance notice of planned releases, maintenance windows, feature deprecations, and changes that may impact telephony operations or integrations.

F. Compliance and Regulatory Requirements

The vendor must demonstrate the ability to support the Alliance's regulatory obligations as a Medi-Cal managed care plan, including CMS Medicare Advantage and D-SNP requirements, DHCS Medi-Cal regulations, NCQA standards, and Alliance privacy and security policies.

For a telephony platform, this includes, but is not limited to, the following capabilities:

- Support for regulated healthcare call center operations, including reliable member and provider access to services, accurate call routing, and continuity of service during peak volumes and critical periods
- Controls to protect member information, including safeguards for call recordings, call metadata, screen recordings (if applicable), and any integrated systems that may involve PHI
- Auditability and reporting capabilities sufficient to support regulatory audits, compliance reviews, grievance investigations, and quality reporting (e.g., call logs, timestamps, queue metrics, and retention controls)
- Operational support for NCQA and CMS access-to-care standards, including the ability to monitor and report on call center performance metrics that may be used to demonstrate compliance

- Alignment with Alliance privacy and security requirements, including adherence to approved data retention, access controls, breach notification processes, and vendor oversight obligations (which are aligned with the California Department of Health Care Services (DHCS) standards).

Vendors must clearly describe how their solution and operational model support these requirements and identify any assumptions, limitations, or dependencies.

IV. Proposal Guidelines

A. Submission Instructions

Vendors must submit their proposals via email to the Alliance Vendor Management Department in PDF format to **VendorManagement@alamedaalliance.org**.

The subject line of the email must read: **Call Center Platform Replacement RFP Response – [Vendor Name]**

Proposals must be received no later than 5 pm Pacific Time on Monday, June 1, 2026. Late submissions will not be accepted.

B. Proposal Costs and Disclaimers

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the vendor. The Alliance reserves the right to reject any or all proposals, waive irregularities, or accept the proposal deemed most advantageous.

No late submissions of any kind will be accepted.

V. Proposal Format and RFP Questions

Proposals should be prepared simply and economically, providing straightforward, concise descriptions of the vendor’s capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

Vendor Background and Experience	1. Provide an overview of your organization, including legal entity name, years in operation, ownership structure (including any parent companies or affiliates), and overall financial and operational stability. 2. Describe your experience delivering cloud-based platforms to healthcare organizations. Your response should include the types of solutions provided, hosting model(s), and the scale and complexity of environments supported.

Vendor Background and Experience (cont.)	3. Describe your experience supporting Medicaid and/or Medicare Advantage programs, including any experience with managed care plans, D-SNP populations, or other regulated healthcare environments. Please highlight how your platform and operational model support access to care, compliance, and audit requirements relevant to these programs. 4. Provide at least three (3) references from healthcare (ideally Health Plan or Payer Organizations) or public sector clients with comparable scope, scale, and regulatory complexity. References should include client name, type of organization, services provided, contract duration, and contact information.
Contact Center Application Capabilities and Omnichannel Support	1. Can your platform pre-verify members via IVR and provide detailed screen pops to agents? 2. Does your system support members and internal self-service for password resets, status checks, and claim updates? 3. Is your IVR able to automatically create tickets and populate integrated systems? 4. How does your IVR handle multiple languages—do prompts require recording, or is text-to-speech available? Is natural language speech recognition provided? 5. What is your recommended method for Patient/Member Authentication in healthcare? 6. Does your platform offer advanced routing based on patient/member journey analytics? 7. Can data-driven routing use info from IVR, CRM, or other integrations? 8. Does your IVR support "Last Agent Routing" with configurable repeat timeframes? 9. Are callers notified of queue position and wait times? 10. Is IVR set up user-friendly so supervisors/admins can quickly add broadcast messages at the caller greeting for emergencies? 11. Is the administrative tool for IVR call flows web-based with “drag-and-drop" configuration? Please describe. 12. Does your IVR have "Queued Callback," letting members retain their place and get called back when next in line? Is reporting available showing completed callbacks? 13. Do you provide a "meeting mode" feature to temporarily close queues, play a meeting message, and redirect calls without manual IVR changes? Can this be reverted easily?

Contact Center Application Capabilities and Omnichannel Support (cont.)	14. Can access to an operator be restricted until members navigate two menu levels or attempt self-service? 15. Aside from standard skills-based routing, are there unique features compared to other CX platforms? 16. Is it simple for one team to take calls for another during high-volume periods? 17. Can agents be assigned to different competency levels based on their specific skill sets? Can agents be assigned to multiple queues/groups simultaneously, and is there a limit? 18. Can Supervisors conduct live monitoring of agents, Whisper for Coaching agents, Barge in to take over the call? 19. Is there an agent assistance tool for searching Knowledge Base documents during calls? 20. Describe any additional AI features that boost contact center efficiency. 21. For SMS/Chat, can your platform route by keywords or phrases? 22. Is fax supported as an inbound channel, or can external fax platforms route in as custom channels? 23. Can the platform send outbound voicemail drops, and do you offer text-to-speech or only recorded messages? 24. Does your platform support queue/shared voicemail? How are group members notified of new voicemails? 25. Can automated, data-driven, or ad-hoc SMS be sent to members, and can recipients reply directly to speak to an agent or bot? 26. Is outbound preview dialer campaign functionality supported? How are outbound lists created, and how are agents notified if they also take inbound calls? 27. Can queue calls be sent to a team voicemail box after hours or during meetings, and how are voicemails distributed and tracked? 28. If an agent is handling email or chat and a voice call enters the queue, does the voice call take priority? How many simultaneous interactions per channel are supported? 29. Can chats be escalated to phone calls without requiring the member to call back? 30. Does your solution provide virtual agents/bots with intelligent responses that don't need agent queuing? 31. Is there a department or team voicemail box with customizable notifications?

Contact Center Application Capabilities and Omnichannel Support (cont.)	32. Can your solution perform post-call surveys? 33. If yes to #32, what methodology does your platform use to conduct post-call surveys? 34. How does the predictive dialer control inbound and outbound call flow? Describe how the algorithm works. 35. Are third-party web services for Do Not Call scrubbing supported? 36. Is WFM included in your packaged solution? 37. Is WFM's historical and real-time schedule adherence supported? 38. Are views into inbound, outbound, and blended contact centers offered to provide a complete picture of adherence? 39. What automated forecasting functionality is available for short-term and long-term? Include capabilities for chat, email, and phone? 40. Describe the ACD capabilities. 41. Can incoming calls be prioritized? If so, describe how priority is assigned. 42. How is on-hold music configured? How many music choices are available? Can different music choices be made for different queues?
Platform Architecture and Core Capabilities	1. Describe your CCaaS platform architecture and hosting model. 2. Identify data center locations and availability design. 3. Describe IVR and call routing capabilities. 4. Describe omnichannel capabilities supported natively. 5. What are the user desktop requirements? 6. What is the maximum agent capacity? 7. Does the cloud solution integrate with Microsoft, specifically, Microsoft Outlook email/calendar system, Office 365, Teams, and MS SQL database? If yes, which systems? 8. Do you integrate with CRM systems? Please describe. 9. How do you report outages — either partial or complete outages? Do you provide uptime data? 10. Describe any processes to capture service and operational feature enhancements from customers to the solution roadmap. 11. Are there different deployment methods? Please describe.
System Management	1. Please provide a brief overview of your IVR, including whether it is fully no-code and GUI-based or if development is needed for some features.

System Management (cont.)	2. Is there a way to test and validate call flows? 3. Is an audit trail available to track recent changes? 4. Does version history exist in the IVR, allowing rollback to previous call flows if needed? 5. What level of role-based access control can be configured (e.g., global vs. individual queue visibility, selective monitor functionality)? 6. Describe how agents are created. Can agents be cloned for faster setup? 7. Are troubleshooting tools available for fixing incorrect call flows? How quickly do changes take effect? 8. Can administrators change an agent's queue easily, without removing them from current queues? 9. What are the minimum and maximum Wrap-Up time durations? 10. Do admin and support users have enhanced tools for troubleshooting queues and agent issues (e.g., endpoint monitoring)? 11. Is there a Sandbox environment available for testing away from production? 12. Is platform status information accessible within our tenant or on your website? 13. What is your platform SLA? 14. To empower departments, which changes should be handled by the business versus administrators? Are there any tasks that must always be managed by the infrastructure team? 15. What actions must only be performed by the service provider? 16. How does E911 operate if an agent calls 911 from their softphone? 17. How are home agents, remote (third-party workers, and mobile workers (field agents) supported? Include limitations of users supported and global location limitations. 18. Do you have an integration for transcription functionality? Does this include transcription of recordings? Is there an additional fee for transcription? How is redaction handled? Please describe. 19. Describe how your IVR connects to external data sources, such as enterprise application databases and web pages.

System Management (cont.)	20. Does the administrative tool for call flows support alternative flows and scheduling for holidays and emergencies? Please describe. 21. Is text-to-speech supported? 22. Can the administrative tool for call flows apply natural language recognition or AI tools to transcribe and support both voice and text interactions? Please describe. 23. Can the system send real-time alerts for potential failures or downtime? 24. Is there functionality to notify administrators when the platform is not functioning properly? 25. Does the platform include proactive monitoring and failure alerts?
Administration and Configuration	1. Describe the administrative and configuration tools provided with the platform, including support for role-based access controls (RBAC). Please explain how administrative permissions are defined, managed, and audited across different user roles (e.g., system administrators, supervisors, IT staff). 2. Describe how call flows, routing logic, IVR menus, and queues are configured and maintained. Please indicate whether configurations can be managed by non-technical administrators, how changes are validated prior to deployment, and how configuration changes are tracked or versioned. 3. Describe your testing and deployment processes for configuration changes, platform updates, and new features. Your response should address support for non-production environments (e.g., test or sandbox), change approval workflows, rollback capabilities, and controls designed to minimize disruption to live telephony operations. 4. What level of flexibility is offered in terms of what the customer can buy, build themselves, or integrate with your solution? 5. What functionality is there for the integration of third-party products? 6. What packaged CRM integrations are available? 7. Do you have an integration for dashboard and wallboard functionality and the dashboard and wallboard platforms? 8. Does your system support single-sign-on (SSO) with common vendors as both subscriber and provider?

Supporting Application and Agent Management	1. Please outline the functions available within your agent desktop client. Specifically, are warm and cold transfer options provided as separate features? Additionally, does the client offer a directory with favorites or speed dial capabilities? 2. Does the agent client include real-time speech-to-speech translation to support live, in-call communication between agents and callers? If yes, please describe the features in detail, including supported languages, accuracy considerations, latency, limitations, and any configuration or licensing requirements. If yes, please indicate whether this capability is certified for use in regulated healthcare environments and how call recordings and transcripts are handled when this feature is enabled. 3. What CRM solutions can your system integrate with seamlessly? 4. Does the agent client include functionality that supports hybrid workers in maintaining consistent performance regardless of their location? 5. Is your platform capable of segmenting wrap codes by team or queue? 6. Do you offer multi-level wrap-up codes to enable more detailed call categorization? 7. Is it possible to customize auxiliary codes by team or queue within your platform? 8. Is there a maximum number of auxiliary codes that can be created? 9. Do you provide both thick and web-based client options? Which operating systems are supported, including mobile platforms? 10. Does your agent client feature a "Training mode" for onboarding new agents, allowing monitoring capabilities with restricted access to other functionalities during training? 11. Can supervisors and agents view team member statuses—including call activity, readiness, call counts, and all auxiliary codes—for enhanced team awareness, including inter-team assistance? Is this visibility available via supervisor dashboards or in real-time reporting? 12. Is it possible for agents to belong to multiple groups or queues simultaneously? If so, is there a limit on the number of queues or skills an agent may be assigned to?

Supporting Application and Agent Management (cont.)	13. Alternatively, aside from being assigned to multiple queues, are agents able to accept calls from another queue when specific thresholds are reached? 14. Do you provide an agent assistance application that enables agents to efficiently search Knowledge Base documentation for contextual information while on calls? 15. Please describe any additional AI-driven features designed to enhance agent productivity. 16. Does your platform include its own knowledge base, or is integration with an existing repository required for KB-enabled features? 17. If you offer an integrated knowledge base, is information imported from external resources—such as SharePoint or networked folders—supported and streamlined? 18. Can reports be scheduled? 19. Can reports be tailored or customized within the platform? 20. Does the system support creating custom reports and dashboards? 21. Is report customization available to suit different user roles or requirements?
Technology, Platform & Integration	1. Describe available APIs and supported integrations. 2. Describe CRM and case management integrations. 3. Describe SSO and identity management support. 4. Please outline the functions available within your agent desktop client. Specifically, are warm and cold transfer options provided as separate features? Additionally, does the client offer a directory with favorites or speed dial capabilities? 5. Are there any real-time translation features integrated into the agent client to support in-call translation? If so, which languages are supported? 6. Do you offer multi-level wrap-up codes to enable more detailed call categorization? 7. Describe how your system addresses branded calls and messages. What additional capabilities do you offer?

Technology, Platform & Integration (cont.)	8. Describe your Customer Workflow Orchestration capability: Can administrators create automated customer journey workflows using natural language instructions — without scripting or professional services — that are triggered by contact center events or signals from connected enterprise systems such as CRM or ERP? Provide a specific example of a workflow that could be built, the systems it would touch, and how exceptions are handled.
Reporting and Analytics	1. Describe real-time dashboards. • Are real-time, on-demand, and historical reporting features included? If so, provide details of the reporting and analytics capabilities. 2. Describe historical and custom reporting. 3. Describe data export capabilities. 4. What standard reports are provided? 5. Can data stored within the contact center platform be extracted to an enterprise data warehouse for further insights and analytics? 6. What KPIs are captured? For example, are KPIs like abandoned percentage, customers waiting, and wait time available within reports and dashboards? KPIs = AHT; Transfer Rate; Abandon Rate; Disconnect rate; FCR; CSAT; Occupancy Rate; Schedule Adherence; Customer Effort Score (CES); Bot Automation Score; Containment Rate. 7. Describe how supervisor dashboards are handled. Do supervisors have real-time agent status visibility to allow for call monitoring, whisper (for agent coaching), and call takeover capability?
Security and Compliance	1. Describe your security program and certifications. What current attestations or certifications do you hold? For example, SSAE 16, SOC 2, HIPAA, HITRUST, etc. 2. Describe HIPAA compliance controls. 3. Describe breach response procedures. 4. Do you have a Certificate of Proof Breach or Cyber Security Insurance? 5. Is there documented information available regarding your security policies and procedures? 6. Which standards (such as NIST, ISO, etc.) guided the development of your security policies? 7. How frequently do you conduct third-party penetration testing? In what ways are those results provided to your customers? When was the last test performed?

Security and Compliance (cont.)	8. What is your approach to handling breaches or violations? Please provide a link to or attach details about your incident response methodology or process. 9. Are any third-party vendors utilized? If so, how do you ensure these vendors meet both your own and our security requirements? 10. Does your contact center solution create audit trails and compliance reports for every action or change made—or attempted—by administrators or managers? 11. How do you retain and view activity logs? Are these logs instantly accessible for delivery and storage at (customer)? If not, can (customer) request specific log data? 12. What measures are in place to secure data transmission between your production facilities and clients' sites? 13. Is an IDS system implemented to prevent unauthorized access? 14. What types of authentication does your contact center solution require for agents, managers/supervisors, and administrators? 15. Can you describe your technology capabilities regarding single sign-on and multifactor authorization, including the security standards and protocols used? 16. Do you mandate a specific browser or operating system? If yes, how does this affect support for options that are not required? 17. Please briefly outline your experience supporting work-from-home agents and share recommended best practices, highlighting any security measures for remote stations. 18. Is your platform multi-tenant? If so, how do you maintain security across tenants? 19. Describe how any data collected about customer use of the service will be used internally or shared with third parties, even if anonymized or aggregated. Is opt-out available? 20. Will customer data ever be accessed, transmitted, or temporarily stored by you or your affiliates outside the United States? If your company operates internationally, is there an option for US-only data storage? Note: We require only US based systems and individuals to access any customer PHI.

Quality Management	1. Do you have an existing QA platform or capabilities to score contacts? 2. Will the customer have the ability to create custom evaluation forms? 3. If so, are the evaluations based on percentages, points, or both? 4. Is there a screen monitoring feature to ensure agents are accessing resources to address caller needs? 5. Can call recordings be searched by various attributes? 6. Are all interaction types recorded, and can you analyze them for sentiment and emotion? This includes voice, email, chat, SMS, social, and phone. 7. Can sections of the call be pulled or flagged for review? 8. Are recording and quality evaluations for multiple interaction types, such as voice, email, chat, SMS, and social included? 9. What kinds of quality management is provided? 10. How does the quality management functionality ensure agent fairness in evaluations? 11. Provide an overview of your conversation transcription features, including search, transcriptions, and languages. 12. Describe any gamification and performance rewards built into the solution. 13. Can you create and enable automation to determine when to send surveys to customers? 14. Can the system monitor calls and provide prompts or interventions if PHI verification is incomplete? 15. Does the platform support real-time checks to ensure all PHI is verified during a call? 16. Is there functionality to enforce PHI verification compliance while an agent is on a call?
AI and Contact Center as a Service	1. What is your most differentiated AI offering, and why is it superior? 2. Briefly describe your AI stack or main products. 3. Does your solution offer virtual agent (bot/AI) capabilities that automate intelligent responses without needing to queue to an agent? 4. Does the solution provide a virtual agent technology to support customer interactions based on conversation or specific tasks?

AI and Contact Center as a Service (cont.)	5. Do you have existing customers in highly regulated industries utilizing your AI? How do you manage their specific requirements? 6. For CCAS, outline your implementation process and provide sample project plans. Is a Project Manager assigned? 7. Estimate installation time based on the discussed functionality. 8. How long does it take for Agents, Supervisors, and Administrators to learn the platform? 9. Does the AI have the capability to make suggestions based on the agent/member conversation to be pulled from the shared document folders? 10. Describe your native generative AI capabilities, including which large language models (LLMs) underpin your platform, which AI features are natively built vs. third-party integrations, and your published AI roadmap for the next 12–24 months. Include whether your AI model training uses customer data and opt-out mechanisms. 11. What is your standard training plan for a business our size (e.g., Zoom/Teams, online, in-person)? How many hours or days to proficiency? 12. Do you offer ongoing online training modules for new employees? 13. Does your Contact Center platform include UC integration? If yes, provide license types and a feature matrix; if no, list any UCaaS partnerships and integrations. 14. Which mobile and desktop OSs are supported for softphone use? Can calls be transferred between devices? 15. Are there automated tools for user creation and provisioning, such as from AD? 16. Which SSO and MFA platforms are compatible? 17. Does your Admin portal support role-based access with granular controls (site/group-specific)? 18. What troubleshooting and visibility features are available (e.g., MOS, Quality reporting)? 19. Can your platform report on usage and call details, and export data to external BI platforms?

AI and Contact Center as a Service (cont.)	20. When a customer interaction is escalated from your virtual agent to a human agent, what context is passed and how? Specifically: (a) Is the full conversation transcript transferred? (b) Is the intent, sentiment, and attempted resolution steps carried over? (c) Does the human agent receive a synthesized summary, or must they read a raw transcript? (d) Is this context transfer native and real-time, or does it depend on a CTI middleware layer? 21. Does your virtual agent support multimodal input from customers — specifically, the ability to interpret and act on customer-submitted images, documents, or structured identifiers (such as serial numbers, forms, or photos of a product)? Describe which input types are supported, how the AI extracts and acts on that information, and whether this requires additional integrations or is native to the platform. 22. Is there AI functionality to monitor and prompt agents when PHI verification has not been properly performed? 23. Does your AI have the ability to intervene in a call if PHI has not been verified?
Implementation	1. Describe implementation approach and timeline. 2. Describe number porting and cutover support. 3. Does your Unified Communications platform offer an app store for streamlined third-party application integration? Additionally, does the platform support any APIs? 4. Does your solution include a unified communications platform (voice, video, chat, and messaging) that serves both contact center agents AND the broader enterprise workforce on a single license and interface? Describe how agents, supervisors, and non-agent employees co-exist within the same environment and what is eliminated from the incumbent vendor stack. 5. Please provide a sample implementation plan within the Project/Implementation Plan Tab. 6. Are implementation services offered as part of your solution? 7. Outline our responsibilities (Alliance) during the implementation process. Please include details on testing, onsite tasks, and remote activities. 8. Will a dedicated project manager be assigned to our account? If so, what is their typical project workload, and how much time will they allocate to our project?

Integration, Storage, and Backend Migration	1. Describe your data retention capabilities for recorded data, including support for long-term retention of up to ten (10) years. In your response, please include:
	• Default retention periods included with standard licensing
	• Available retention extensions and maximum supported retention period
	• Description of storage tiers used (e.g., hot, warm, cold, archive), including:
	  ○ Typical timeframes for each tier
	  ○ Expected retrieval time by tier
	• How data transitions between tiers over time
	• Whether archived data remains searchable and retrievable for audit, regulatory, or legal purposes
	• Any limitations, constraints, or additional costs associated with long-term archived data
	2. What are the methods for collecting consent for recordings?
	3. Is screen recording built-in or third-party?
	4. How long is screen recording data kept? Minimum: 90 days.
	5. If recordings are archived with a third party, can they still be searched in the contact center app? Is metadata preserved?
	6. Can recording be enabled/disabled per queue for inbound and outbound calls?
	7. If recording is default-on, can agents stop it? Does it auto-resume or require manual restart?
	8. Is automated QA available for all calls? Can its scoring algorithm be tuned if needed?
	9. Can automated QA score a call partially and leave the evaluation open for manual scoring?
	10. Does your QA platform include a system for approving evaluations, and for agents to acknowledge or appeal their evaluations
	11. Can multiple users participate in call calibration and scoring?
	12. Is there functionality for collaborative call evaluation across multiple reviewers?
	13. For manual QA, can the platform auto-select N calls monthly for grading and filter them by type?
	14. After scoring, does the agent get an email with the score and recording link? Can agents self-score?
	15. After scoring, can scorecards be filtered by agent?
	16. Does the QA system include dashboards with visual data?

Integration, Storage, and Backend Migration (cont.)	17. Are there pre-built reports, or must they be created? Can agents run their own historical QA reports? • What metrics are searchable to locate Call/QA? If integrated, can searches use third-party data, e.g., Member ID? • Does your platform show QA trends for agent, team, or department? • How can members be sent or asked for a CSAT survey? • Is estimated CSAT available via sentiment or AI analysis? • Is transcription of recorded calls provided? • Can transcriptions be native and translated, and support non-English languages in automated QA? • How much historical data is needed for accurate forecasts? • Can UCCX or UKG data be imported for forecasting or WFM? • What agent features are in your QA and WFM/WFO modules? • Can supervisors manage QA and WFM/O, or is this administrative? • System Integration: o UKG o HealthSuite o TruCare o Portal o MS Teams o BO and Power BI o Symplr (PR) o PerformRx (MHK and Darwin) o Proprietary Systems – ODS Viewer; QS; PCP Change Tool. o CHCN portal o Hanna portal o SharePoint; Smartsheet o Skillsoft Percipio o Envoy o Share911 o Application Extender o CES

Integration, Storage, and Backend Migration (cont.)	○ CFMG website ○ Medi-Cal AVES ○ Medi-care website ○ CMS ○ Quality Suite ○ COD ○ AAH Portal ○ Access links to internal folders: Provider Call Center, Prop 56 checks EOB, PRD rejections, PNF Rejected Claims, DocuStream Rejected Claims. • System Migration: UCCX, UCCM;, CUIC;, Finesse, 2Ring and Calabrio
Business Continuity and Disaster Recovery	1. Describe DR architecture and RTO/RPO targets. 2. Describe DR testing frequency. 3. Explain the escalation path for unresolved support incidents and provide supporting documentation on escalation protocols. 4. How frequently are system patches and updates released? On which day and at what time are these applied? Can these ever impact service availability? 5. Do you offer disaster recovery testing methods for clients? 6. Indicate the number of service outages experienced by all or a portion of your customer base in the last 12 months. 7. Describe your incident management support for all user types and support tiers. 8. Please detail your standard customer support, including coverage and available support hours. 9. What are your typical response and resolution times for support inquiries? Do you maintain SLAs for these metrics? 10. Is it possible to contract for 24/7 technical support on an as-needed basis if not currently provided? 11. Provide an overview of your customer service organization and operational processes. 12. Which time zone does your support operate within? 13. Where are your technical support resources based? Please specify the city and country. 14. Are your technical support personnel employees or contractors? If contractors, please describe the nature of your relationship.

Business Continuity and Disaster Recovery (cont.)	15. Are there additional fees associated with different support packages? If so, please outline the various levels of support available. 16. What channels are available for submitting trouble tickets? 17. Describe your problem and issue resolution process, including corrective action procedures and troubleshooting methodologies.
Vendor Support and SLAs	1. Describe the support model and escalation paths. 2. Provide uptime and incident response SLAs.
Pricing and Commercial Terms	1. Provide detailed pricing. 2. Describe contract term options.