



GOVERNMENT OF PUERTO RICO

Department of Health
Medicaid Program

Puerto Rico Department of Health
Medicaid Program, ATTN: Elizabeth Otero Martinez
268 Luis Muñoz Rivera Ave.
World Plaza – 12th Floor (Suite 12)
San Juan, Puerto Rico 00918

2022-PRMP-MES-ContactCenter-004

Technical Proposal



Licitador: LinkActiv, LLC

Dirección Postal: PO Box 366398

San Juan PR 00936-6398

Teléfono: 787-641-0101

Contacto: Javier Avilés Feliú

Correo electrónico: javier.aviles@linkactiv.com

**LinkActiv, LLC_Cover Letter and
Exec Summary**

Attachment B

Response Template

RFP-2022-PRMP-MES-ContactCenter-004



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1.0 Submission Cover Sheet – Attachment B

The Vendor must include the following Cover Letter sheet provided in this section 1.0, and an individual authorized to legally bind the Vendor must sign the Cover Letter in ink and include it in the Quotation copy labeled "Original Quotation."

Instructions: The vendor should provide the following information regarding the person responsible for completing of the vendor response. This person should also be the person PRMP should contact for questions and/or clarifications.

Name:	LinkActiv Group	Phone:	787.641.0101
Address:	Marginal Carr. 165 km 2.8	Fax:	787.641.3905
	Guaynabo, PR 00970	E-mail:	javier.aviles@linkactiv.com

Subject to acceptance by PRMP, the vendor acknowledges that by submitting a response and signing in the space indicated below, the vendor is submitting a formal offer to meet that which is being requested within this RFP. In addition to providing a signature to number 6: Disclosure of Response Contents in this section, failure to sign the Submission Cover Sheet or signing it with a false statement shall void the submitted response or any resulting contracts.



_____ / 5/11/2022
 Original signature of individual authorized to legally bind the Company / Date

Name (typed or printed):	Javier Avilés Feliú
Title:	Sales & Warehouse Director
Company name:	LinkActiv LLC
Physical address:	Marginal Carr. 165 km 2.8
	Guaynabo, PR 00970
State of Incorporation:	Puerto Rico



By signature hereon, the Vendor certifies that:

1. All statements and information prepared and submitted in response to this RFP are current, complete, and accurate.
2. The vendor's response meets the requirement of this RFP.
3. The vendor will comply with all federal and Commonwealth laws, rules, and regulations that are in force currently or anytime during the term of a resulting contract.
4. The vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. PRMP will hold "confidential" all response information, including both technical and cost information, during the evaluation process, except for the questions and answers before the submittal of proposals. All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded in accordance with the laws of Puerto Rico.
5. The company represented here is an authorized dealer in good standing of the products and services included in this response.
6. The vendor, any subcontracting partners, and its proposed resources are eligible to participate in this transaction and have not been subjected to suspension, debarment, or similar ineligibility determined by any federal, state, or local governmental entity; are in compliance with the Commonwealth's statutes and rules relating to procurement; and are not listed on the federal government's terrorism watch list as described in Executive Order 13224. Entities ineligible for federal procurement are listed at <https://sam.gov/content/home>.
7. Prior to award, the vendor affirms it will have all current approvals, licenses, or other qualifications needed to conduct business in Puerto Rico.



2.0 Submission Cover Letter

The Vendor should also provide the following information as part of the Submission Cover Letter:

- A list of the people who prepared the Vendor's Quotation, including their titles
 - Payment Information
 - Legal Notice Information
 - A list of all subcontractors, if any, that the Vendor will use on the Project, if PRMP selects to contract with the Vendor
 - For each proposed subcontractor, the Vendor should attach a letter from the subcontractor, signed by an individual authorized to legally bind the subcontractor, with the following included in the letter: **N/A**
- Subcontractor Letters (If Applicable) **N/A**

Instructions: Provide a Cover Letter that includes the information required above.

With over 25 years of experience within the contact center industry we propose a complete engagement solution to deliver outstanding service within the Health Care Industry.

2.1 List of people who prepared the quote:

NAME	POSITION
Javier Aviles Feliú	Sales & Warehouse Director
Genaro Herrera Dos Reis	Operations Director
Waleska Burgos Calderin	Finance Director
Alberto Franco	IT Director
Sylvia Valentín	People Director

2.2 Payment Information:

PAYMENT INFORMATION

Name:	Eric Vazquez Lamboy
Address:	Marginal Carr. 165 km 2.8
City, State and, zip code:	Guaynabo, PR 00970
Phone:	787-0101
email:	eric.vazquez@linkactiv.com

2.3 Legal notice Information:

LEGAL NOTICE INFORMATION

Name:	Javier Avilés Feliú
Address:	Marginal Carr. 165 km 2.8
City, State and, zipcode:	Guaynabo, PR 00970
Phone:	787-0101
email:	javier.aviles@linkactiv.com

2.4 Disclosure of Response Contents:

All vendors, selected for negotiation by PRMP, will be given equivalent information concerning cost negotiations. All cost negotiations will be documented for the procurement file. Additionally, PRMP may conduct target pricing and other goods or services level negotiations. Target pricing may be based on considerations such as current pricing, market considerations, benchmarks, budget availability, or other methods that do not reveal individual vendor pricing. During target price negotiations, vendors are not obligated to reduce their pricing to target prices, but no vendor is allowed to increase prices. All materials submitted to PRMP in response to this RFP shall become the property of the Government of Puerto Rico. Selection or rejection of a response does not affect this right. By submitting a response, a vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. If a vendor determines there is a "Trade Secret" contained in the proposal, the



vendor must send a written notification to the Solicitation Coordinator when submitting the proposal to prevent public disclosure of the "Trade Secret." A redacted version of the technical proposal must be provided to PRMP at the time of proposal submission if there are "trade secrets" the proposing Vendor wishes to not be made public. A redacted proposal should be provided separately from the technical and cost envelopes and should be in addition to (not in place of) the actual technical or cost proposal. PRMP will keep all response information confidential, including both technical and cost information, during the evaluation process, except for the questions and answers before the submittal of proposals. Upon completion of response evaluations, indicated by public release of a Notice of Award, the responses, and associated materials will be open for review on the website or at an alternative 29 location as defined by PRMP. Any trade secrets notified by the vendor to the Solicitation Coordinator will be excluded from public release. By signing below, I certify that I have reviewed this Request for Proposals (and all of the related Amendments) in its entirety; understand the requirements, terms, and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the vendor to execute this bid or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that, to the best of my knowledge, the vendor has properly registered with any Puerto Rico agency that may require registration

LinkActiv LLC

Company

Javier Avilés Feliú

Representative Name, Title

787-641-0101

Contact Phone

5-11-2022

Date



3.0 Table of Contents

The Vendor must include the following Cover Letter sheet provided in this section 1.0, and an individual authorized to legally bind the Vendor must sign the Cover Letter in ink and include it in the Quotation copy labeled "Original Quotation."

Instructions: The vendor should provide the following information regarding the person responsible for completing of the vendor response. This person should also be the person PRMP should contact for questions and/or clarifications.

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B. Operations

C. Reporting

D. Quality and Training

E. SLAs

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V. General Services Administration (ASG)

VI. Puerto Rico Treasury Department (Hacienda)

VII. Unified System of Internal Revenue (SURI)



4.0 Executive Summary

Instructions: This section should be a brief (one [1] to three [3] page) summary of the key aspects of the vendor's Technical Proposal. The Executive Summary should include an overview of the vendor's qualifications, approach to delivering the services described in the RFP; time frame for delivering the services; the proposed team; and the key advantage(s) of the vendor's proposal to PRMP.

Overview

LinkActiv Group is the Customer Engagement division of the Grupo Ferré Rangel (www.grupoferrerrangel.com).

GFR is, a family-owned multinational, strategic investment holding company with a value growth portfolio in Real Estate, Media, Customer Engagement and Social Innovation. GFR growth-seeking strategies, creative culture and multi-talented leadership guarantee the success of our diversified businesses.

Guided by a commitment to entrepreneurship, Grupo Ferré Rangel pursues investment discipline, sustainable growth, value creation and social empowerment. This discipline has been a constant throughout its 100 years of entrepreneurship and the Company's relentless transformation has been the result of anticipating change and laying the groundwork for future growth. Grupo Ferré Rangel's headquarters are located in San Juan Puerto Rico with operations on the island, the United States and Latin America.

As part of GFR, LinkActiv Group was founded in 1994. With over 25 years of experience (10 of them within the healthcare industry) its main location is based in Guaynabo, Puerto Rico, employs more than 1,400 employees, holds 1,800 working stations within three contact center facilities, strategically located across the island, and serves more than 30 clients in several industries.

As part of its value proposition LinkActiv crafts high-performing campaigns that combine human touch points, technology and the advantages of nearshore pricing while being 100% domestic. For over 10 years we have been serving as the operational arm of 3 healthcare company leaders in Puerto Rico. We currently manage over 100,000 monthly transactions within health care (90% phone calls and 10% chats and emails), consistently delivering KPIS and exceeding customer satisfaction.

Moreover, LinkActiv Group offers state-of-the-art customer engagement solutions such as voice, email, chat, direct mail, social media management, mailing, mail sorting, and custom application development. Additionally, LAG provides Customer Relationship Management (CRM), staffing, strategic data-based services, in-house training, warehouse, and fulfillment services.

For safety and compliance purposes LAG holds certifications such as FCC & PCI, Health Insurance Portability and Accountability Act (HIPAA), National Minority Supplier Development Council, SSAE-18 Audit Compliant and USPS Seamless Full Service Certified.

With proven hands-on experience and KPI delivery in customer service management for clients in PR, USA & Canada, in both Spanish and English. At LinkActiv we take great care selecting the right candidates and, our employee sourcing, testing, selecting, training and on-boarding processes, are geared towards getting the right profiles for customer service. Custom On-Boarding program which objectives are to make all new hires feel "at home" since the day they are selected to work on any of our campaigns and increase agent retention. Agents with longer tenure = better customer service and shorter, more efficient interactions. More efficient interactions = efficiency = lower overall operational costs. This efficiency translates to better services for CLIENT and its customers.



LinkActiv has a dedicated IT and AVAYA Certified Staff, with more than 20 years combined experience, working with all the AVAYA Contact Center platforms. We also have a dedicated Business Analytics and Reports Unit, in charge of providing tailored reporting solutions, in real time or automatically sent to our clients by 30-minute intervals. We have implemented multiples ACD to ACD configurations projects for major clients such as PRASA, Triple S and T-Mobile. With a combined volume of more than 15 million transactions, and with an average up time of 99.9%.

From one original site in Guaynabo, our operation has developed into a multi-site strategy. We currently have 3 sites strategically located within the Island:

1. Guaynabo location: employs more than 700 communicators and has 500 working stations, serves more than 15 clients in several industries.
2. Aguadilla center holds 26 sqf, 450 working stations and employs 661 communicators.
3. Our new site located in Roosevelt Roads, Ceiba: holds 400 working stations and employs over 200 communicators.

Our operation centers are designed with 3 main goals: reliability, employees' comfort and special recruitment and training areas.

Talking about reliability:

- 3 layers of electricity power redundancy (Generator A, Generator B + UPS with battery backup 80 min).
- 7 days of fuel autonomy.
- 3 different carriers for data and communication services.
- 5 days of autonomy via water cisterns.
- AC systems designed to have redundancy machines for all areas to keep operations running all the time.
- Over 400 parking spaces per facility

We have resources on site from 8am to 8pm from Monday to Sunday. In case Ops need assistance outside this interval, we have in place a structured Escalation List. Our resources administer all our platforms and we have maintenance contracts with aggressive SLAs in place in case we could need immediate expert assistance on our most important platforms. Our team consists on prepared and highly engaged resources that can handle any situation that could arise.

BrandTeam Structure: We approach Client Business solutions with a multi-disciplinary BrandTeam structure. This enables LinkActiv to deliver seamless, timely and business building solutions.

Reports: Custom designed to each client's information needs. It works on two levels: the first delivers daily KPI results and the second generates quarterly business reviews with clients to review results, project management assessment and identifies actions going forward. Critical to the process success is that each project has a timetable and a task leader.

Data Security: LinkActiv Management considers information and the systems that support it as strategic assets and is therefore committed to maintain effective information security measures to protect these assets in accordance with LinkActiv's corporate security policies. The corporate security policies and information protection procedures are reviewed and adopted by LinkActiv IT personnel. The policies are applicable to LinkActiv employees, including contractors and authorized personnel acting on behalf of the company. Relationships with third party service providers are governed by service contracts, which include clauses governing how information is used. The security policies and information protection procedures apply to all stages of the data lifecycle: creation, distribution, storage, processing, transport, consulting and destruction; and to all stages in the life of systems which process the data: analysis, design, development, implementation, operation and maintenance.



Approach to Deliver the Services

In order to comply with customer requirements of:

- Average wait time, prior to the call being answered by an agent, must be less than 30 seconds for 80% of calls received
- Abandon rate must be 5% or less
- FCR must be at least 70% for all calls and chats received from providers
- 100% of emails must be acknowledged within 2 business days
- 100% of emails received must be responded to within 5 business days
- 80% of chats received must be responded to by an agent in less than 30 seconds
- Calls must have a quality score of 90% or higher
- Call recordings will be provided to PRMP within 5 business days, when requested

We propose the following program structure: (60,000 calls monthly).

- Customer Service Representatives: 74
- Senior Supervisor: 1
- Supervisor: 5
- QA: 3
- Training: 3
- Back Office: 1

Implementation work plan outlining the **key steps** and **milestones** for the set-up and transition of services.

- a. LinkActiv's implementation strategy uses Project Management methodology and tools for planning and implementing single and simultaneous projects. These includes project management, status reporting, client communications, dealing with issues and change management.
- b. Gantt charts are used to track the start and finish dates by week or months of the critical activities of a project and who is responsible for each task (specific resources or departments.) LinkActiv's use of this method reduces risk and guarantees delivery of projects on time and on budget.
- c. At LinkActiv, we have the capability to manage and implement project rollouts in any one or combination of the following implementation approaches: Big Bang, Phased Rollout or Parallel Adoption (for existing operations).



Advantages

Our competitive advantage resides in the ability to craft high-performing programs that combine human touch points, technology and the advantages of nearshore pricing while being 100% domestic.

- **Our people:** Our Customer Engagement division is all about people, starting with the people we serve, how we engage with them impact their business, to the people that are selected to be part of our day-to-day operation. We strive to impact in a positive way by empowering society, nurturing relationships, enhancing living, strengthening culture, fostering education, and generating local economic growth. We are not only committed to the people we serve, we also have a social commitment with our country and the people in it. Our highly educated bilingual talent pool provides qualified, committed, and reliable work force that relates to mainland Americans without lost-in-translation issues. Furthermore, our people's charisma makes a difference in every customer interaction enabling a flawless, pleasant, and effective communication.
- **Our Culture:** we are committed to our people and social innovation initiatives. We offer a positive and safe work environment that promotes diversity and equality among our people.
- **Our experience:** Our vast experience in highly regulated industries such as Health Care, Banking, and Federal Agencies, set us apart from our competitors.
- **Our Management Team:** with over 25+ years of experience (10 years Healthcare related) has the knowledge to support customers' needs in a changing environment.
- **Our capabilities:** We are a one-stop-shop for all customer engagement needs. Multimedia Contact Center, Customer Relationship Management, Strategic Database Services, Mailing, Print Shop, Warehouse and Fulfilment, In-house Training Center, Staffing Services, Processes Management, Technology, Detailed Reporting, App Development, Robust Business Continuity Plan.
- **Our Strict Data Privacy Policies** and industry related compliance certifications.
- **Our Location:** Puerto Rico makes us a 100% domestic solution, strategically located to serve not only the local market but also all time zones in the United States and Canada.



5.0 Vendor Contact Information

Instructions: Complete the following information regarding the Vendor's headquarters and primary contact for any questions pertaining to the Vendor's responses to this RFQ. Do not change any of the completed cells. Any changes to the completed cells could lead to the disqualification of the Quotation.

Table 1. Vendor Contact Information

COMPANY HEADQUARTERS INFORMATION:		
Company Name:	LinkActiv LLC	
Address:	Marginal Carr. 165 Km. 2.8	
City, State & Zip Code:	Guaynabo, PR 00970	
Company Type (Check One):	<input checked="" type="checkbox"/> Private <input type="checkbox"/> Public	
Company Size:	900 (Total Number of Employees)	
Annual Revenue:	26,228,728 (2019)	
PRIMARY CONTACT INFORMATION:		
Name:	Javier Avilés Feliú	Title: Sales & Warehouse Director
Address:	Marginal Carr. 165 Km. 2.8.	
City, State & Zip Code:	Guaynabo, PR 00970	
Phone:	787.641.0101	Fax: 787.641.3905
E-mail:	Javier.aviles@linkactiv.com	
REGIONAL OR LOCAL OFFICE INFORMATION:		
Company Name:	LinkActiv LLC	
Region Name:	Puerto Rico	
Address:	Marginal Carr. 165 Km. 2.8.	
City, State & Zip Code:	Guaynabo, PR 00970	
Primary Contact:	Javier Avilés feliú	
Phone:	787.641.0101	Fax: 787.641.3905



E-mail:	javier.aviles@gfrpr.com
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5.1 Subcontractor Contact Information (If applicable) – N/A

Instructions: Complete the following information regarding the subcontractor's contact information. If more than one subcontractor is proposed, add more Tables as necessary. Do not change any of the completed cells. Any changes to the completed cells could lead to the disqualification of the Quotation.

Table 2. Subcontractor Contact Information

COMPANY INFORMATION:	
Company Name:	
Address:	
City, State & Zip Code:	
Company Type (Check One):	<input type="checkbox"/> Private <input type="checkbox"/> Public
Company Size:	(Total Number of Employees)
Annual Revenue:	
PRIMARY CONTACT INFORMATION:	
Name:	Title:
Address:	
City, State & Zip Code:	
Phone:	Fax:
E-mail:	

LinkActiv, LLC_
Vendor Qualification and Experience
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2.8 Subcontractor References (If applicable)- N/A.....	19



1.0 Vendor Organization Overview – Attachment C

The Vendor should include details of the Vendor’s Experience in this section. The details should include Vendor organization overview; corporate background; Vendor’s understanding of the relevant domain; and Vendor’s experience in the public sector.

Instructions: Provide all relevant information regarding the general profile of the Vendor. Do not change any of the completed cells. Any changes to the completed cells could lead to the disqualification of the Proposal.

Vendor Organization Profile

VENDOR ORGANIZATION PROFILE:	
Company Name	LinkActiv LLC
Name of Parent Company	Grupo Ferre Rangel
Industry (NAICS) (North American Industry Classification System)	132353827
Type of Legal Entity	LLC
Company Ownership (i.e., Private/Public, Joint Venture)	Private
Number of Full Time Employees	900
Last Fiscal Year Company Revenue	\$26M
Last Fiscal Year Company Net Income	\$5.5M
% of Revenue from State and Local Government Clients in the United States	33% US / 1% Gov
Number of Years in Business	25
Number of Years Vendor has been Providing the Type of Services Specified in the RFQ	20



VENDOR ORGANIZATION PROFILE:	
Number of Employees Providing the Type of Services Specified in the RFQ	Over 300
Headquarters in the USA	NO
Locations in the USA	NO
Office Servicing this Account	Puerto Rico

1.1 Subcontractor Organization Overview (If applicable) – N/A

The Vendor should only complete this section if proposing subcontractors as part of the Proposal.

Instructions: Provide all relevant information regarding the profile of each subcontractor. This section should be duplicated in its entirety for each subcontractor included. Do not change any of the completed cells. Any changes to the completed cells could lead to the disqualification of the Proposal.

Subcontractor Organization Profile – N/A

SUBCONTRACTOR ORGANIZATION PROFILE	
Subcontractor Name	
Type of Legal Entity	
Company Ownership (i.e., Private/Public, Joint Venture)	
Puerto Rico Economic Development Commission Minority Business Certification Number (if applicable)	
Headquarters Location	
Date Founded	
Number of Employees	
Last Fiscal Year Company Revenue	
Last Fiscal Year Company Net Income	
Services to be Provided	
Experience of Subcontractor in Performing the Services to be Provided	
Brief Description and Number of Projects that Vendor has	



SUBCONTRACTOR ORGANIZATION PROFILE	
Partnered with this Subcontractor on	
Locations Where Work is to be Performed	

2.0 Mandatory Qualifications

The vendor must complete this section to demonstrate that it has the experience needed to meet the requirements in this RFP. Table 9 below, lists each mandatory qualification, the vendor must note whether it meets the qualification and provide narrative demonstrating fulfillment of the requirement. The vendor must list each relevant experience separately and completely every time it is referenced.

Mandatory Qualification Items	Vendor Meets?		Provide A Brief Narrative to Demonstrate Fulfillment or Requirement
	YES	NO	
The vendor must have at least three (3) years of experience in establishing and maintaining a contact center of similar size, scope, and complexity as described in this RFP.	YES <input checked="" type="checkbox"/>	NO	LinkActiv has been in business for more than 28 years with proven track record of delivering KPI's and results.
The vendor must demonstrate at least three (3) years' experience in Medicaid, Medicare, and/or other federally regulated operations (e.g., CMS, Internal Revenue Services [IRS], FCC).	YES <input checked="" type="checkbox"/>	NO	We have as a client one of the largest health care companies in PR for the past 12 years. Handling their client service for the Advantage sector among others. LinkActiv handled the customer service line for Medicaid Program for 4 years+. At this moment we provide the mailing service for Medicaid in PR.
The vendor must include at least three (3) references from clients within the last three (3) years that demonstrate the vendor's ability to perform the scope of work described in this RFP.	YES <input checked="" type="checkbox"/>	NO	<p>Dpto de Salud de Puerto Rico - Programa Medicaid – Client since 2011</p> <p>Sra. Luz Cruz-Romero Directora de Operaciones leacruz@salud.gov.pr 787-765-1230 Calle Eleonor Roosevelt Piso 4 Hato Rey, PR 00936-8184</p> <p>Triple-S PR Rico – Client since 2009 Sra. Nanette Dumont Client Service Director ndument@ssspr.com 787-749-4949 #Ave Rosselvelt San Juan PR 00920</p> <p>T-Mobile - Client since 2009 Mrs. Jose Detres Director, Senior Telesales Manager jose.detres@t-mobile.com</p>



2.1 Vendor Corporate and Business Experience

The Vendor should describe its corporate background to provide context of the organization that will be providing the products and services in this RFQ.

Instructions: Describe any existing or recent (within the last five [5] years) business relationships the vendor or any of its affiliates or proposed subcontractors have with PRMP, and/or Puerto Rico's municipalities.

As part of GFR, LinkActiv Group was founded in 1994. With over 25 years of experience (10 of them within the healthcare industry) its main location is based in Guaynabo, Puerto Rico, employs more than 1,400 employees, holds 1,800 working stations within three contact center facilities, strategically located across the island, and serves more than 30 clients in several industries.

LinkActiv provides full customer engagement services including bilingual and bi-cultural multi-channel solutions. This customer engagement division serves different markets such as Puerto Rico, USA and Canada, primarily focused on the development and execution of interactive and personalized tele-communications strategies.

As part of its value proposition LinkActiv crafts high-performing campaigns that combine human touch points, technology and the advantages of nearshore pricing while being 100% domestic.

Moreover, LinkActiv Group offers state-of-the-art customer engagement solutions such as voice, email, chat, direct mail, social media management, mailing, mail sorting, and custom application development. Additionally, LAG provides Customer Relationship Management (CRM), staffing, strategic data-based services, in-house training, warehouse, and fulfillment services.

Strategic world-class technology partners like Avaya Technologies, Cisco Systems, Microsoft BI, Pitney Bowes and Amazon Web Services allow the technology infrastructure resilience necessary for a 24/7 operation along with redundancy provided for power, water, voice and data.

For safety and compliance purposes LAG holds certifications such as FCC & PCI, Health Insurance Portability and Accountability Act (HIPAA), National Minority Supplier Development Council, SSAE-18 Audit Compliant and USPS Seamless Full Service Certified.



LinkActiv has over 10 years of experience delivering services to the health insurance industry to both plan beneficiaries and provider networks. We have served clients in the health industry among the following programs: commercial, government and Medicare Advantage.

Through our one stop shop services we have provided Contact Center services for the following companies in the health care industry:

Triple-S Commercial Division & Triple-S Advantage an Independent licensee of BlueCross BlueShield Association:

- We manage a contact center division of over 300 dedicated agents who provide customer service to beneficiaries and providers, seven days a week. These services include: pre-authorizations, eligibility, billing, payments, and services and products available during the open enrollment season.
- Mailing and fulfillment services are part of our services and include the storage management of promotional and medical items, and customer care mailing pieces such as birthday postcards, and new services notifications for Triple S.

MCS & MCS-Advantage:

- We support MCS a local health care insurance provider on a yearly basis with Customer Engagement programs for Medicare Advantage during the Open Enrollment season, providing a team of over 100 dedicated agents running an outbound campaign managing multiple interactions per month to serve beneficiaries with the medical coverage plans and benefits.

Puerto Rico Department of Health-Medicaid Program:

- We currently provide mailing services to the Department of Health Medicaid Program, with over 100k monthly mailing pieces.
- Our call center division formerly provided an operation of over 100 agents who managed appointments.

MMM Healthcare:

- Call Center seasonal operation includes survey management from a provided customer data base.

Alta Resource US:

- We provided a sale dedicated call center operation to manage BC/BS Affordable Care Act Products. Our insurance licensed agents managed locally, over five thousand calls per month among the Texas territory and exceeded conversion rate while complying regulatory requirements.

We Improve customer satisfaction and engagement

We provide 24/7 service to our customers, allowing calls at all times, were a dedicated certified healthcare specialist is able to provide customers with the proper solution. Our agents are trained and certified to manage difficult situations and provide outstanding service. To comply with the best healthcare industry standards our agents are required with a minimum of an associate degree or 4 years of previous healthcare experience.

Reliability & certifications

- **SSAE18** -LinkActiv is certified as an entity that meets the standards of the SSAE18 standard (previously SAS70). This certification, product of a rigorous



process of a 3rd party audit, ensures that LinkActiv operates under the strictest standards of process compliance and information security.

- Use of the proper protocols to process sensitive and/or confidential customer data.
- Definitive proof that the necessary controls follow safety standards at large such as FERPA, HIPAA, SOX and GLBA business service levels
- Certification that the data is accessible to authorized personnel only when necessary.
- **HIPAA Compliant** – (Privacy) Safeguards for keeping protected health information safe from a people, administrative, and contractual standpoint. (Security) Safeguards for keeping protected health information specifically in electronic form (computers, networks, email, software, electronic transmissions, etc.) safe from disasters, hackers, and electronic theft.
- **PCI** –Certification issued by the payment card industry that ensures that LinkActiv complies with the highest standards of protection of electronic transaction data
- **Safe and fast-recovery installations.** LinkActiv has bunker-type facilities, designed with business continuity in mind.
- **Business Continuity Plan** – Emergency management experienced, we provide a strong contingency plan to immediately overcome emergency situations and operate regularly.
- **Experience** – Management Team with over 10 years of experience in the Healthcare Industry.
- **Dedicated Recruitment** – Our recruitment team provides healthcare specialized recruiters to find the best talent pool.
- **Dedicated Staff** – Healthcare specialized and experienced agents.
- **Brand Team** – A dedicated team that will live and extend your brand, with previous healthcare knowledge, providing confidence and working towards your brand's goal.
- **Specialized Command Center** – 24/7 campaign monitoring to for immediate action and ongoing insights.
- **Specialized Training** – The healthcare industry is regulated by several laws that can change according to the state, therefore LinkActiv provides continuous healthcare trainings promoting best practices and updates within the industry.
- **Dedicated Workshops** – It is proven that working with healthcare can lead to a stressful environment, to manage all situations properly LinkActiv provides agents and supervisors with monthly workshops, that help them manage stress and difficult situations.
- **Education** – E-learning healthcare dedicated modules
- **Complete Customer Engagement Solution**– A 360 Healthcare solution for:
 - Fully bilingual (English and Spanish), CTI-based inbound-outbound system that integrates traditional voice and IP technologies to contact,



acquire, service and retain customers. The automated, interactive technology consolidates multiple channels at agent's computers, including Telephone, Web, IVR, SMS, Email, MMS and Chat. **These touch points provide broad opportunities for the beneficiaries to engage and ensure an outstanding customer experience.**

- **(CRM)** - Seamless CRM services that includes data control, analytics, accessibility of information to allow secure retrieval and utilization of beneficiaries and patients' information.
- **Data Base** - Complete, multi-channel database solutions that allow clients to build, maintain and use customer data efficiently. LinkActiv's health care database management expertise translates data into insights to deliver measurable ROI, improve beneficiary's satisfaction and optimize new revenue streams.
- **Direct Mail** - Our mail operation is certified by the USPS to manage all stages of a successful mail campaign. With over 60 million annual mailing pieces, we are the biggest private mail post office local provider. The services include address standardization, (CASS, FSIMB, NCOA Certified), full postal campaign process, mail piece design, variable data, color printing, full letter shop services, USPS mail presorting and intelligent mail barcode "IBM". This touch point allows the beneficiaries to engage and stay informed, especially during the open enrollment season.
- **Warehouse and Fulfilment** – Barcode and web-based inventory management programs for better control and visibility of processes.
- **In-house Training Center** – Tailor-made training to satisfy each industries requirement. The healthcare industry is regulated by several laws that can change according to the state, therefore LinkActiv provides continuous healthcare trainings promoting best practices and updates within the industry.
- **Staffing Services** – Full-service agency for temporary and/or full-time projects. Our recruitment team provides healthcare specialized recruiters to find the best qualified talent pool.
- **Processes** – Comprehensive processes are implemented among the operation to provide high quality service specially in highly regulated industries. Our expertise allows us to reduce call time for a better customer experience and operations control.
- **Technology** – In-house IT resources committed to guarantee optimum connectivity, and compliance with client's operational requirements, service level agreements (SLA's) and data privacy control.
- **Reporting** - In-house capabilities to tailor reports, and real-time reporting tools to track KPI performance.
- **App Development** - Custom app development is available to fulfill any customer business needs



2.2 Contact/Call Center Engagements

Include at least three (3) references from projects performed within the last three (3) years that demonstrate the vendor's ability to perform the scope of work described in this RFP. PRMP prefers references from three (3) different clients/projects to demonstrate experience; however, this is not a requirement. The vendor should include a project description, contract dates, and contact information (customer points of contact, addresses, telephone numbers, and email addresses). The vendor should explain whether it performed the work as a prime contractor or as a subcontractor. The vendor is NOT to change any of the pre-filled cells in the following tables. The vendor may add additional reference tables as necessary

Call Center Engagements Completed in the Last Five (5) Years

REF #	ENGAGEMENT NAME	CUSTOMER NAME	CUSTOMER CONTACT	PROJECT DURATION	BUSINESS DISPUTE?	
					YES	NO
1	SSS	Nannette Dumont	787-749-4949	7 years (ongoing)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	MCS	Rosadaliz Berrios	787-758-2500 ext. 2833	15 years (ongoing)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Medicaid	Luz E. Cruz	(787) 765-2929 Exts. 6707/6712	6 years	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	T-Mobile	José Detrés	787-460-8191	15 years (ongoing)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Assurant	Isabel Dávila	787-250-6470	16 years (ongoing)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

***Most of the engagements described above are still active within the operation. Additional engagements will be provided upon request.**

2.3 Vendor's Work Locations

The Vendor's management staff must be available to participate in-person for project-related meetings as scheduled by PRMP during normal business hours, Monday through Friday 8:00 a.m. to 5:00 p.m. AST, except Federal, State and local holidays. The vendor's contact center staff must be available to attend training and to conduct contact center activities during normal business hours as stated in the requirements.

At no time shall the Vendor maintain, use, transmit, or cause to be transmitted information governed by privacy laws and regulations outside of the United States and its territories.

Instructions: Describe the locations where the Vendor proposes performing work associated with this RFQ. Indicate the site(s) from which the Vendor will perform the relevant tasks identified in this Proposal. Include an explanation of how the vendor meets the physical security requirements for the location.



From one original site in Guaynabo, our operation has developed into a multi-site strategy. We currently have 3 sites strategically located within the Island:

- Guaynabo location: employs more than 700 communicators and has 500 working stations, serves more than 15 clients in several industries.
- Aguadilla center holds 26 sqf, 450 working stations and employs 661 communicators.
- Our site located in Roosevelt Roads, Ceiba: holds 400 working stations and employs over 200 communicators.

Our sites offer:

- 3 layers of electricity power redundancy (Generator A, Generator B + UPS with battery backup 80 min).
- 7 days of fuel autonomy.
- 3 different carriers for data and communication services.
- 5 days of autonomy via water cisterns.
- AC systems designed to have redundancy machines for all areas to keep operations running all the time.
- 24/7 security monitored
 - All our sites have recording cameras that are monitored 24/7 from our headquarter facilities for security purposes.
 - Employees are provided with unique entrance card to facility and campaign access, along with an ID card to help monitor the employees access.
 - Our locations are protected 24/7 by armed security personnel.

The account support team for this project could be located at our Guaynabo or Ceiba facilities with 24/7 working operation, access to main universities and a highly educated bilingual talent pool, brand new facilities, latest technology and a low percentage turnover.

Our sites are covered by a proven business continuity plan for power, water, voice, and data redundancy in hurricane-proof, concrete-made facilities, and over 400 parking spaces providing a reliable and safe work environment.

Our proposed locations meet the standards of location, providing 24/7 operational offices within Puerto Rico, with a robust continuity plan, security at all times and a dedicated expert team to ensure outstanding customer service.

2.4 Existing Business Relationships with the Puerto Rico

Instructions: Describe any existing or recent (within the last five (5) years) business relationships the Vendor or any of its affiliates and proposed subcontractors has with the Puerto Rico government.

Departamento de Turismo de PR	Active	2002
Hacienda de Puerto Rico	Active	2003
Autoridad de Acueductos y Alcantarillados	Active	2004
Medicaid Puerto Rico	Active	2003



2.5 Business Disputes

Instructions: Provide details of any disciplinary actions and denote any that are pending litigation or Terminated for Cause or Convenience and associated reasons. Also, denote any other administrative actions taken by any jurisdiction or person against the vendor. List and summarize all judicial or administrative proceedings involving your sourcing activities, claims of unlawful employment discrimination, and anti-trust suits in which you have been a party within the last five (5) years. If the vendor is a subsidiary, submit information for all parent companies. If the vendor uses subcontractors, associated companies, or consultants that will be involved in any phase of this project, each of these entities will submit this information as part of the response.

We have not experienced any disputes or complaints.

2.6 Reference - Vendor's Understanding of Puerto Rico Medicaid Provider Enrollment Effort

Instructions: Describe the Vendor's understanding of the PRMP's provider enrollment effort. Discuss the Vendor's strategies and areas of focus related to this service.

The Medicaid program in Puerto Rico differs from Medicaid programs operating in each of the 50 states and the District of Columbia in three important ways.

The Puerto Rico Medicaid delivery system is a subset of the larger public government healthcare delivery system for most of the island's population. The Puerto Rico Department of Health is the single state agency, and they have a cooperative agreement with the Puerto Rico Health Insurance Administration (PRHIA) also known as Administración de Seguros Salud de Puerto Rico (ASES) which implements and administers island-wide health insurance system. Approximately half of Puerto Rico's 3.5 million residents have low incomes and depend upon the public health system for their medical care.

Through Section 1108 of the Social Security Act (SSA), each territory is provided base funding to serve their Medicaid populations.

Unlike the 50 states and the District of Columbia, where the federal government will match all Medicaid expenditures at the appropriate federal matching assistance percentage (FMAP) rate for that state, in Puerto Rico, the FMAP is applied until the Medicaid ceiling funds and the Affordable Care Act available funds are exhausted.

As part of our proposal, we will provide enrollment assistance by the following strategies:

- **Providing sufficient agent coaching and support.** We will support our agents by providing dedicated resources (coach/supervisor) for agents who have questions or need assistance while helping a client.
- **Ability to expand call center capacity to meet increased need.** Due to our 24/7 operating capacities, we are able to extend hours of operation in high enrollment season.



- o **Offering consumer friendly features.** Enrollment and orientation can be simplified for callers. Our phone system can be programed to provide all necessary details on a pre- set voice message for callers to listen prior redirecting their call, we can also provide chat features for a bread customer experience.

2.7 Vendor Reference Form:

To realize the objectives of this RFQ, PRMP is issuing this to contract with a Vendor who has experience in maintaining a contact/call center.

Include at least three (3) business references (for the Prime Vendor). Each reference chosen should clearly demonstrate the Vendor’s ability to perform the Scope of Work described in the RFQ.

Instructions: Provide the information requested in the Tables below. The Tables may be replicated if the Vendor would like to include more than three (3) references. Do not change any of the completed cells. Any changes to the completed cells could lead to the disqualification of the Proposal.

Reference 1

VENDOR INFORMATION	
Vendor Name: LinkActiv LLC	Vendor Contact Name: Javier Aviles
Project Dates: 2013 – Current	Vendor Contact Phone: 787.602.1053
CUSTOMER INFORMATION	
Customer Organization: Triple S Advantage	Customer Contact Name: Nannette Dumont
	Customer Phone: 787-749-4949
Customer Address: 18 Calle 1, Guaynabo, PR 00966	Customer Email: ndumont@ssspr.com
	Customer Fax: (787) 706-2833
PROJECT INFORMATION	
Total Vendor Staff: 300	
Project Objectives: <ul style="list-style-type: none"> • A single contact center solution with a high availability infrastructure was required. • English & Spanish (bilingual) communicators were required. • The project was targeted to provide service to beneficiaries and providers. • Manage 2 different Lines of Businesses (LOB): Commercial & Medicare Advantage • Manage 80,000 monthly calls per month. 	



Project Description:

- HIPAA Compliant Operations
- Over 300 FTEs to achieve a wide variety of Service Level Agreements on both: Commercial and Medicare Advantage clients.
- Workforce Management (forecasting & planning)
- Performance management at different levels (every 30 minutes, daily, weekly, monthly, quarterly)

Vendor's Involvement (Role and Scope):

LinkActiv serves as the main contact center provider, managing customer service & inquires for the commercial division. Sales Manager and account manager were in charged of managing customer relation, and compliance requirements. The both delivered results and served as a liaison with the company and the customer.

Project Benefits:

Consistent KPI achievement

- Service level: 80%/30s, 85%/30s & 90%/30s, based on LOB agreements.
- Abandoned calls: less than 3%
- Quality scores over 85%, CSAT over 94% and FCR over 75%.

Summarize any staffing issues that the Vendor may have had that had an impact to the project and what the impact(s) was:

We had no staffing issues at this project.

VENDOR KEY PERSONNEL ASSIGNED TO PROJECT

Name: Genaro Herrera	Role: Operations Director
Name: Ivelisse Gonzalez	Role: Operations & Customer Relationship Manager

PROJECT MEASUREMENTS

Operating Budget of Organization: Over \$1M	# of Employees and External Users: 300
Estimated One-time Costs: Over \$100,000	Actual One-time Costs: None
Reason(s) for Change in One-time Cost: Confidential Information	
Original Value of Vendor's Contract: Over \$1.5M	Actual Total Contract Value: Over \$1.5M
Reason(s) for Change in Value: N/A - Confidential Information	
Number of Change Requests: N/A – Confidential Information	Actual Total Costs of Change Requests: N/A – Confidential Information



Reason(s) for Change Requests: N/A – Confidential Information		
Estimated Start & Completion Dates	From: N/A	To: N/A
Actual Start & Completion Dates	From: 2013	To: Current
Reason(s) for Difference Between Estimated and Actual Dates: N/A		
If the Vendor performed the work as a subcontractor, the Vendor should describe the scope of subcontracted activities: N/A		
Describe the project's billing and invoicing procedures and any special accommodations: We manage billing and invoicing on a monthly period of time.		
Ability to attain and support CMS Certification: We provide CMS certified staff upon request.		



Reference 2

VENDOR INFORMATION	
Vendor Name: LinkActiv LLC	Vendor Contact Name: Javier Aviles
Project Dates: 2005 – Current	Vendor Contact Phone: 787.602.1053
CUSTOMER INFORMATION	
Customer Organization: MCS	Customer Contact Name: Rosadaliz Berrios
	Customer Phone: 787.758.2500
Customer Address: Central Office MCS Plaza, 1er piso Suite 105, 255 Ave. Ponce de León, San Juan, PR 00916- 1919	Customer Email: Sergio.palacio@medicalcardsystem.com
	Customer Fax:
PROJECT INFORMATION	
Total Vendor Staff: 145	
<p>Project Objectives:</p> <ul style="list-style-type: none"> • The development of a specialized outbound team, to contact recently enrolled and active beneficiaries. • Agent's objective was to offer welcome calls, explain benefits, and provide other valuable information to active beneficiaries, such as coverage and plan benefit updates. • Another objective was to find HIPPA and PHI compliant agents, and train them in a period of 4 weeks. 	
<p>Project Description:</p> <ul style="list-style-type: none"> • Develop and execute a working plan within three weeks to provide an outbound team of over 100 dedicated agents, specialized on HIPPA, CMS, PHI, and MCS Classic Care products. • Manage a working team for an operation of over 300,000 monthly outbound calls. 	
<p>Vendor's Involvement (Role and Scope):</p> <p>Design, implement and supervise the operation, and comply consistently with the customer's requirements. LinkActiv was also in charged of recruiting and training the personnel with all the requested health care industry requirements.</p>	
<p>Project Benefits:</p> <ul style="list-style-type: none"> • Managed a successful operation of over 100 agents, achieving 80k effective contacts per month, exceeding the customer's goals while complying with regulatory requisites. 	



Summarize any staffing issues that the Vendor may have had that had an impact to the project and what the impact(s) was:

There were not staffing issues in this project.

VENDOR KEY PERSONNEL ASSIGNED TO PROJECT

Name: Javier Aviles	Role: Sales & Warehouse Director
Name: Eduardo Guardiola	Role: Operations & Client Relationship Manager

PROJECT MEASUREMENTS

Operating Budget of Organization: Over \$1M	# of Employees and External Users: 145
Estimated One-time Costs: N/A Confidential Information	Actual One-time Costs: N/A Confidential Information
Reason(s) for Change in One-time Cost: N/A Confidential Information	

Original Value of Vendor's Contract: Over \$1.5M	Actual Total Contract Value: Over \$1.5M
Reason(s) for Change in Value: N/A Confidential Information	

Number of Change Requests: N/A Confidential Information	Actual Total Costs of Change Requests: N/A Confidential Information
Reason(s) for Change Requests: N/A Confidential Information	

Estimated Start & Completion Dates:	From: N/A	To: N/A
Actual Start & Completion Dates:	From: 2005	To: Current

Reason(s) for Difference Between Estimated and Actual Dates:
N/A

If the Vendor performed the work as a subcontractor, the Vendor should describe the scope of subcontracted activities:
N/A



Describe the project's billing and invoicing procedures and any special accommodations: We manage billing and invoicing on a monthly period of time.
Ability to attain and support CMS Certification: We provide CMS certified staff upon request.

Reference 3

VENDOR INFORMATION	
Vendor Name: LinkActiv LLC	Vendor Contact Name: Javier Aviles
Project Dates: 2011-2017	Vendor Contact Phone: 787.602.1053
CUSTOMER INFORMATION	
Customer Organization: PR Medicaid	Customer Contact Name: Luz E. Cruz
	Customer Phone:
Customer Address:	Customer Email: luz.cruz@salud.pr.gov
	Customer Fax:
PROJECT INFORMATION	
Total Vendor Staff:	125
Project Objectives: <ul style="list-style-type: none"> PR State Medicaid Program's main objective was to develop a customer service unit to advise existing and potential beneficiaries on eligibility requirements, pre-screenings, and appointment via a call center rather than in the local service offices. Being in a program that blends highly confidential and medical conditions (PHI), data security and integrity were fundamental for this campaign. This project required to be managed within Puerto Rico local offices. 	
Project Description: <ul style="list-style-type: none"> Develop a customer service unit to service and manage over 100k monthly calls and pre-screening requests. 	
Vendor's Involvement (Role and Scope): Hire, train, supervise and manage the personnel according to the customer requirements and needs, while keeping required KPIS, customer satisfaction levels and data management and collection standard compliance.	



Project Benefits:

- Compliance and successful management of 100k calls per month.
- Consistent KPI attainment:
 - 5% abandoned calls
 - Service level of 80/20
 - Quality scores over 90%

Summarize any staffing issues that the Vendor may have had that had an impact to the project and what the impact(s) was:

There were no staffing issues in this program.

VENDOR KEY PERSONNEL ASSIGNED TO PROJECT

Name: Javier Aviles	Role: Sales & Client Relationship Manager
Name: Eduardo Guardiola	Role: Operations & Client Relationship Manager

PROJECT MEASUREMENTS

Operating Budget of Organization: Over \$2M	# of Employees and External Users: 125
Estimated One-time Costs: N/A Confidential	Actual One-time Costs: N/A Confidential
Reason(s) for Change in One-time Cost: N/A Confidential Information	

Original Value of Vendor's Contract: Over \$2M	Actual Total Contract Value: Over \$2M
Reason(s) for Change in Value: N/A Confidential Information	

Number of Change Requests: N/A Confidential Information	Actual Total Costs of Change Requests: N/A Confidential Information
Reason(s) for Change Requests: N/A Confidential Information	

Estimated Start & Completion Dates:	From: N/A	To: N/A
Actual Start & Completion Dates:	From: 2011	To: 2017



Reason(s) for Difference Between Estimated and Actual Dates: N/A
If the Vendor performed the work as a subcontractor, the Vendor should describe the scope of subcontracted activities: N/A
Describe the project's billing and invoicing procedures and any special accommodations: We manage billing and invoicing on a monthly period of time.
Ability to attain and support CMS Certification: We provide CMS certified staff upon request.

2.9 Subcontractor References (If applicable)- N/A

If the proposal includes the use of subcontractor(s), include at least three (3) business references.

Instructions: Provide the information requested in the Tables below. Replicate the Table if more than three (3) references are desired. Do not change any of the completed cells. Any changes to the completed cells could lead to the disqualification of the Proposal.

Subcontractor Reference 1 N/A

SUBCONTRACTOR INFORMATION	
Subcontractor Name:	Subcontractor Contact Name:
Project Dates:	Subcontractor Contact Phone:
CUSTOMER INFORMATION	
Customer Organization:	Customer Contact Name:
	Customer Phone:
Customer Address:	Customer Email:
	Customer Fax:
PROJECT INFORMATION	



Project Objectives:		
Project Description:		
Subcontractor's Involvement (Role and Scope):		
Project Benefits:		
SUBCONTRACTOR KEY PERSONNEL ASSIGNED TO PROJECT		
Name: (Add more rows as needed)	Role: (Add more rows as needed)	
Name: (Add more rows as needed)	Role: (Add more rows as needed)	
PROJECT MEASUREMENTS		
Operating Budget of Organization:	# of Employees and External Users:	
Estimated One-time costs:	Actual One-time costs:	
Reason(s) for Change in One-time cost:		
Original Value of Subcontractor's Contract:	Actual Total Contract Value:	
Reason(s) for Change in Value:		
Estimated Start & Completion Dates:	From:	To:
Actual Start & Completion Dates:	From:	To:



Reason(s) for Difference Between Estimated and Actual Dates:



Subcontractor Reference 2 N/A

SUBCONTRACTOR INFORMATION	
Subcontractor Name:	Subcontractor Contact Name:
Project Dates:	Subcontractor Contact Phone:
CUSTOMER INFORMATION	
Customer Organization:	Customer Contact Name:
	Customer Phone:
Customer Address:	Customer Email:
	Customer Fax:
PROJECT INFORMATION	
Project Objectives:	
Project Description:	
Subcontractor's Involvement (Role and Scope):	
Project Benefits:	
SUBCONTRACTOR KEY PERSONNEL ASSIGNED TO PROJECT	
Name: (Add more rows as needed)	Role: (Add more rows as needed)
Name: (Add more rows as needed)	Role: (Add more rows as needed)
PROJECT MEASUREMENTS	
Operating Budget of Organization:	# of Employees and External Users:
Estimated One-time costs:	Actual One-time costs:



Reason(s) for Change in One-time cost:			
Original Value of Subcontractor's Contract:		Actual Total Contract Value:	
Reason(s) for Change in Value:			
Estimated Start & Completion Dates:		From:	To:
Actual Start & Completion Dates:		From:	To:
Reason(s) for Difference Between Estimated and Actual Dates:			

Subcontractor Reference 3 N/A

SUBCONTRACTOR INFORMATION	
Subcontractor Name:	Subcontractor Contact Name:
Project Dates:	Subcontractor Contact Phone:
CUSTOMER INFORMATION	
Customer Organization:	Customer Contact Name:
	Customer Phone:
Customer Address:	Customer Email:
	Customer Fax:
PROJECT INFORMATION	
Project Objectives:	
Project Description:	



Subcontractor's Involvement (Role and Scope):			
Project Benefits:			
SUBCONTRACTOR KEY PERSONNEL ASSIGNED TO PROJECT			
Name: (Add more rows as needed)		Role: (Add more rows as needed)	
Name: (Add more rows as needed)		Role: (Add more rows as needed)	
PROJECT MEASUREMENTS			
Operating Budget of Organization:		# of Employees and External Users:	
Estimated One-time costs:		Actual One-time costs:	
Reason(s) for Change in One-time cost:			
Original Value of Subcontractor's Contract:		Actual Total Contract Value:	
Reason(s) for Change in Value:			
Estimated Start & Completion Dates:		From:	To:
Actual Start & Completion Dates:		From:	To:
Reason(s) for Difference Between Estimated and Actual Dates:			

**LinkActiv, LLC
Vendor Organization and Staffing
Attachment D**

Response Template

RFP-2022-PRMP-MES-ContactCenter-004

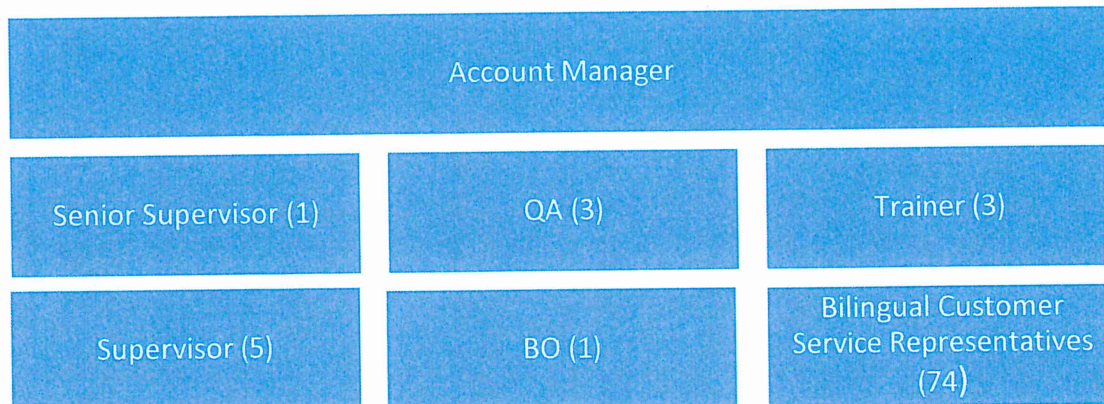


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2.0 Organizational and Staffing Roles – Bios Credential	4
3.0 Proposed Key Staff and Roles	4
4.0 Talent Acquisition Process	5

1.0 LinkActiv Brand Team

Proposed Team Structure



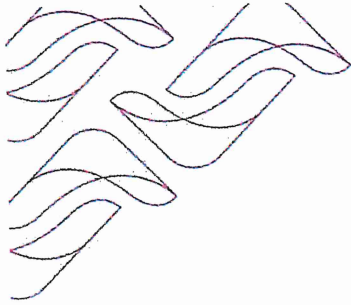
Advantages

Our competitive advantage resides in the ability to craft high-performing programs that combine human touch points, technology and the advantages of nearshore pricing while being 100% domestic.

- **Our people:** Our Customer Engagement division is all about people, starting with the people we serve, how we engage with them impact their business, to the people that are selected to be part of our day-to-day operation. We strive to impact in a positive way by empowering society, nurturing relationships, enhancing living, strengthening culture, fostering education, and generating local economic growth. We are not only committed to the people we serve, we also have a social commitment with our country and the people in it. Our highly educated bilingual talent pool provides qualified, committed, and reliable work force that relates to mainland Americans without lost-in-translation issues. Furthermore, our people's charisma makes a difference in every customer interaction enabling a flawless, pleasant, and effective communication.
- **Our Culture:** we are committed to our people and social innovation initiatives. We offer a positive and safe work environment that promotes diversity and equality among our people.
- **Our experience:** Our vast experience in highly regulated industries such as Health Care, Banking, and Federal Agencies, set us apart from our competitors.
- **Our Management Team:** with over 25+ years of experience (10 years Healthcare related) has the knowledge to support customers' needs in a changing environment.
- **Our capabilities:** We are a one-stop-shop for all customer engagement needs. Multimedia Contact Center, Customer Relationship Management, Strategic Database Services, Mailing, Print Shop, Warehouse and Fulfillment, In-house Training Center, Staffing Services, Processes Management, Technology, Detailed Reporting, App Development, Robust Business Continuity Plan.
- **Our Strict Data Privacy Policies** and industry related compliance certifications.
- **Our Location:** Puerto Rico makes us a 100% domestic solution, strategically located to serve not only the local market but also all time zones in the United States and Canada.



2.0 Organization and Staffing Roles – Bios Credentials



Management Bios

Customer Engagement Division

A Grupo Ferré Rangel company



3.0 Proposed Key Staff and Roles

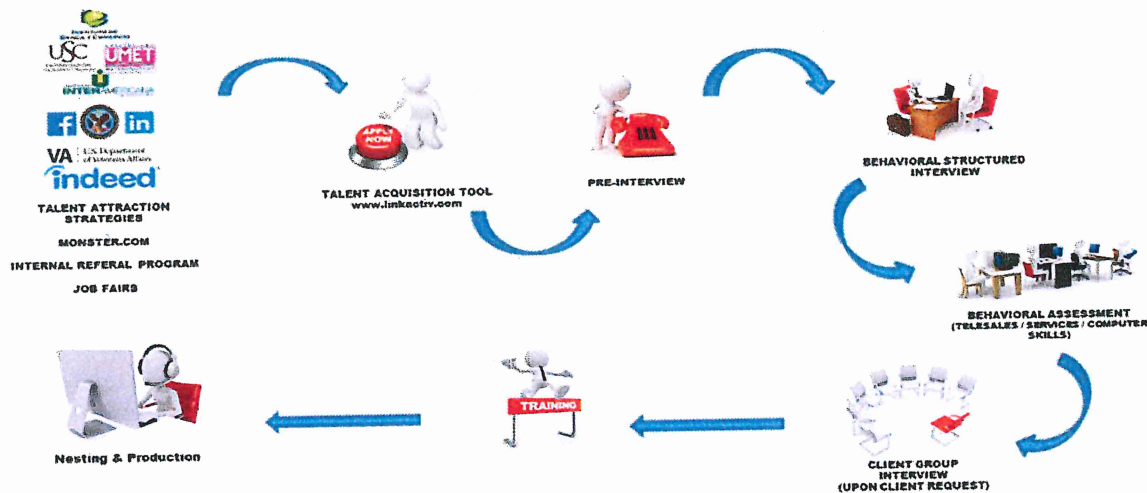
Name	Proposed Role	Experience in Proposed Role
Genaro Herrera	Operation Director	Over 20 years
Eduardo Guardiola	Operation & Client Relationship Manager	Over 15 years
Javier Avilés	Sales & Marketing Director	Over 20 years



4.1 Talent Acquisition Process:

LinkActiv initiates its talent sourcing from higher education institutions and online media sources, as well as referrals from employees who are more than willing to recommend friends and family. The process (illustrated below) begins with an online application tool that facilitates profile information and early screening processes. After the online application step; voice and first impressions are screened through a phone interview. After the first two steps qualified candidates are invited to a face to face personal interview. Together with the interview a structured behavioral and skill test is completed. The test is administered using the Kenexa Hiring model to evaluate tele-sales and computer behavioral skills. Applicants must score above 80% in order to move forward in the hiring process. The final stage before hiring is a group interview to measure group behavioral interaction. This is a LinkActiv best practice which complements “one on one” assessments that occur in earlier stages.

After the group interview the final hire decision is made and the applicant is invited to join the team.



We customize our hiring process according to client's industry compliance and regulations

- **Beyond training a comprehensive on Boarding Approach:**

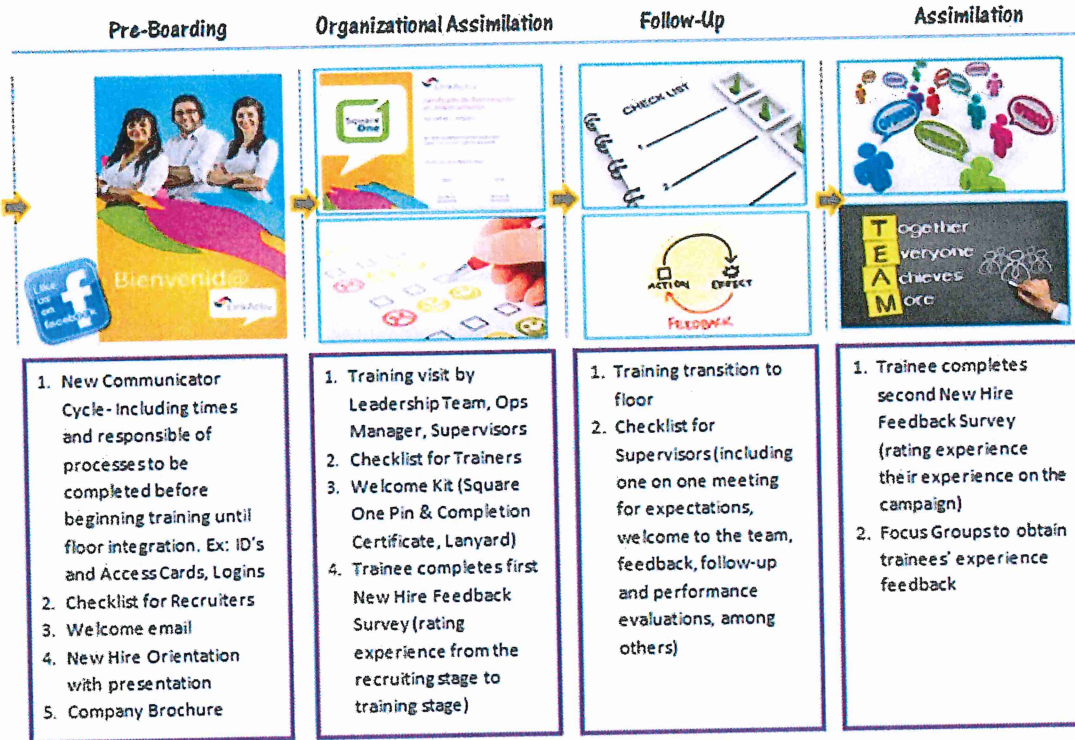
More than a by the numbers leaning process, training at LinkActiv is an exchange process that builds the trainee's confidence and sense of belonging to our company. Through the training sessions several key priorities are addressed. They are:

- Welcome Kit with corporate and personal information
- Clear definition of goals
- Interaction (conversation) with LinkActiv Leadership
- Continuous interaction with supervisors and communicators currently working on the T-Mobile account
- Most importantly two way feedback

The priorities outlined above are achieved thru the process diagram below which has contributed to preparing well trained motivated and committed communicators. The result is that attrition has be reduced 19% since the On-Boarding program was initiated 18 months ago.



ONBOARDING PROCESS



**LinkActiv, LLC
Mandatory Requirement
Attachment E**

Response Template

RFP-2022-PRMP-MES-ContactCenter-004

7.5. Attachment E: Mandatory Requirements

This section will provide instructions to vendors to respond to mandatory requirements as an attachment titled **Attachment E: Mandatory Requirements**.

Instructions: The mandatory requirements must be met by the vendor as a part of the submitted proposal. Failure on the part of the vendor to meet any of the mandatory requirements may result in their disqualification of the proposal at the sole discretion of PRMP. The term “must” stipulates and identifies a mandatory requirement. The vendor is to demonstrate compliance with mandatory requirements in their proposal. If the vendor’s proposal meets the mandatory requirements, the vendor’s proposal may be included in the cost evaluation of this RFP. For mandatory requirements that involve documentation, vendors should include that documentation with their technical proposal. Any documentation for mandatory requirements not supplied with their technical proposal must be submitted before contract execution. When appropriate, the vendor’s proposal must provide narrative responses addressing the area listed below:

1. The vendor must provide the right of access to systems, facilities, data, and documentation to PRMP or its designee to conduct audits and inspections as is necessary.
2. The vendor agrees to relinquish any published toll-free telephone numbers established for Medicaid support.
3. The vendor must support PRMP’s requests for information in response to activities including, but not limited to:
 - a. Compliance audits
 - b. Investigations
 - c. Legislative requests
4. The vendor must provide authorization from a parent, affiliate, or subsidiary organization for the PRMP to have access to its records if such a relationship exists that impacts the vendor’s performance under the proposed contract.
5. The vendor must agree to comply with current and future PRMP and federal regulations as is necessary to support the services outlined in this RFP.
6. The vendor must help ensure that all applications inclusive of internet, intranet, and extranet applications associated with this contract are compliant with Section 508 of the Rehabilitation Act of 1973, as amended by 29 United States Code (U.S.C.) §794d, and 36 Code of Federal Regulation (CFR) 1194.21 and 36 CFR 1194.22.
7. The vendor must perform according to approved SLAs and identified KPIs with associated metrics in the areas listed in Appendix 2: Service-Level Agreements and Performance Standards.
8. The vendor must provide a drug-free workplace, and individuals must not engage in the unlawful manufacture, distribution, dispensation, possession, abuse, or use of a controlled substance in the performance of the contract. (Drug-Free Workplace Act of 1988)

9. The vendor must comply with federal Executive Order 11246 related to Equal Employment Opportunity Act, the Clean Air Act, and the Clean Water Act.
10. The vendor must establish and maintain the contact center in Puerto Rico.
11. The vendor must serve as a trusted partner to PRMP and represent PRMP's interests in all activities performed under the resulting contract.
12. The vendor must, at a minimum, include the standard invoice package contents for PRMP, including, but not limited to:
 - a. An authorized representative of the contracted party must sign an itemized description of services rendered for the invoice period. Additionally, the vendor must include a written certification stating that no officer or employee of PRMP, its subsidiaries, or affiliates, will derive or obtain any benefit or profit of any kind from this vendor's contract. Invoices that do not include this certification will not be paid
 - b. Provide PRMP with a list of all services completed within an invoice period, as well as evidence that the PRMP has accepted and approved the work
 - c. Provide PRMP with three (3) physical and one (1) electronic invoice packages in support of the PRMP's review and approval of each invoice
 - i. Invoice Package #1 – Original Signature
 - ii. Invoice Packages #2 - #3 – Hard Copy
 - iii. Invoice Package #4 – Electronic
13. The vendor must provide increased staffing levels if requirements, timelines, quality, or other standards are not being met, based solely on the discretion of and without additional cost to PRMP. In making this determination, PRMP will evaluate whether the vendor is meeting service levels as defined in the Contract.
14. The vendor must agree that PRMP retains ownership of all data, procedures, applications, licenses, and materials procured or developed during the contract period, when applicable.
15. The vendor must provide evidence that staff have completed all necessary forms prior to executing work for the contract.
16. The vendor staff must not have the capability to access, edit, and share personal information data, with unauthorized staff, including but not limited to:
 - a. Protected Health Information (PHI)
 - b. Personally Identifiable Information (PII)
 - c. Financial Transaction Information
 - d. Federal Tax Information (FTI)
 - e. Social Security Administration (SSA) data including, but not limited to: family, friends, and acquaintance information

By signing below, I certify that I have reviewed these Mandatory Requirements in their entirety and agree that the vendor meets, and will continue to meet, each of these Mandatory Requirements in full.

LinkActiv LLC

(Company)

Genaro Herrera, Operation Director

(Representative Name, Title)

787-641-0101

(Contact Phone/Fax Number)

5-11-2022

(Date)

**LinkActiv, LLC
Requirements Traceability Matrix
Attachment F**

Response Template

RFP-2022-PRMP-MES-ContactCenter-004

Requirements Traceability Matrix

This Requirements Traceability Matrix contains the following worksheets:

- A. Systems and Technology
- B. Operations
- C. Reporting
- D. Quality and Training
- E. SLAs

PRMP Contact Center
 RFP: 2022-PRMP-MES-ContactCenter-004
 Attachment F: Requirements Traceability Matrix

Instructions

This attachment to RFP: 2022-PRMP-MES-ContactCenter-004 contains the requirements and service level agreements (SLAs) for the contact center contract.

This Requirements Traceability Matrix contains the following worksheets:

- A. Systems and Technology
- B. Operations
- C. Reporting
- D. Quality and Training
- E. SLAs

This Microsoft Excel file must be completed and submitted as part of the vendor's proposal. The vendor should also provide a narrative description of how the requirements will be met in Attachment G: Response to Statement of Work.

A description of the columns in worksheets A through E is provided below.

Field	Definition / Instructions
Req. #	The unique identification number assigned to each requirement or service level agreement (SLA) DO NOT EDIT THIS FIELD.
Requirement Description	The detailed description of the requirement or SLA. DO NOT EDIT THIS FIELD.
Requirement Met	Vendor response to whether the requirement will be met by the vendor. For worksheets A through D, indicate whether the requirement, as currently written, will be met by the vendor's proposal: Yes, No, or Clarification For each SLA requirement, indicate agreement: Yes or No
Vendor Proposed Response	If the Response Met is set to "No" the vendor must provide a response as to why the requirement cannot be met, as currently written.
Clarifying Comments*	If the Response Met is set to "Clarification", the vendor must provide clarifying comments.
Proposed Liquidated Damages Amount**	For each SLA, provide a recommended Liquidated Damages amount per measure for noncompliance.

* Only applicable to worksheets A through D

** Only applicable to worksheet E

Vendor Response			
REQ #	Requirement Description	Requirement Met	Vendor Proposed Response
A.1	The contractor must provide network services (e.g., voice over IP [VOIP], internet, etc.) and other technology sufficient to handle operations in accordance with Commonwealth policies and security protocols.	Yes	
A.2	The contractor must provide telephony equipment sufficient to handle call volumes (within generally acceptable industry standards), maintain calls in queue with auto-route according to first in/first out, and play automated messages while callers are on hold.	Yes	
A.3	The contractor must provide phone system technology that includes a programmable interaction voice response (IVR) with pre-recorded messages and menu option features. The navigation tree will use pre-approved language and options that can be changed as needed.	Clarification	commands: not just typing the number of the menu option on the phone. We have the platform that provides for that, but a development would have to be done.
A.4	The contractor must provide automatic call distribution (ACD) services, as part of the telephony system, to route specific calls to qualified agents to avoid long wait times in queue and should be programmed by type of inquiry (complexity level).	Yes	
A.5	The contractor must supply all equipment (e.g., computers, monitors, ACD System, IVR/telephones, headsets, chat application, TTY, etc.) necessary to provide services as detailed in the contract.	Yes	
A.6	Contact center staff must be able to route phone calls and chat interactions that cannot be resolved by the agent to a supervisor or specialist.	Yes	
A.7	The contractor must be able to send automated reminders (e.g., appointment date and time).	Yes	
A.8	The contractor is responsible for initial configuration of computers, hosting the platform, and providing technical support for the contact center operations.	Yes	
A.9	The contractor must provide services for outbound campaigns, both automated (e.g., outbound notifications) and agent assisted (e.g., those that require an interaction with the contact center agent).	Yes	
A.10	The contractor must provide the capability to broadcast text messages to those who have opted for text message receipts. Text message broadcasts shall include items that reduce the number of contacts to the contact center, such as application received, application status/ application approved as well as other communications which can help reduce the contact volume for the contractor.	Yes	
A.12	The contact center staff must be able to access the PRMP PEP via the web via Virtual Private Network (VPN).	Yes	
A.13	The contact center staff must be able to access the PRMP Call Center management System (CCMS) via VPN.	Yes	
A.14	The contact center staff must be able to access PRMMIS via VPN.	Yes	
A.15	The contact center staff must be able to access MEDITIG3 via VPN.	Yes	
A.16	The contact center staff must be able to access LMS via the internet.	Yes	
A.17	The contact center staff must be able to access email.	Yes	
A.18	The contractor must be able to send automated reminders (e.g., appointment date and time).	Yes	
A.11	The contractor must establish and maintain a Disaster Recovery Plan.	Yes	
A.19	The contractor must conduct a full disaster recovery test at least once a year and report the results to PRMP.	Yes	

Vendor Response			
REQ #	Requirement Description	Requirement Met	Vendor Proposed Response
			Clarifying Comments
B.1	The contractor must establish and maintain the contact center, and all operations of the contact center, locally in Puerto Rico.	Yes	
B.2	The contractor must provide a fully operational contact center with all services no later than July 31, 2022.	Yes	
B.3	Contact center staff must be fluent in Spanish and proficient in English.	Yes	5% of th estaff will be bilingual
B.4	Contact center agents must be able to handle inquiries in both Spanish and English.	Yes	
B.5	The contractor's contact center operations must be physically separated from the contractor's other clients/accounts.	Yes	
B.6	The contractor must have contact center agent staff that is solely located in the Medicaid contact center designated area within the contractor's facility, or as stated in the Business Continuity Plan when needed.	Yes	
B.7	The contractor must provide space, computer, and phone systems within the contractor's facilities for one Medicaid representative.	Yes	
B.8	Advanced notice of arrival will be provided by PRMP.	Yes	
B.9	The contractor will provide access to PRMP to listen to calls remotely.	Yes	
B.10	Contact center employees must have Puerto Rico Negative Criminal Record certificate and be screened through the OIG exclusion lists.	Yes	
B.11	The contact center must be open Monday through Friday from 8:00 a.m. to 6:00 p.m. local time for beneficiaries and 8:00 a.m. to 5:00 p.m. for providers, except for some holidays (to be determined at the start of each calendar year).	Yes	
B.12	The contractor must provide a message to callers when the contact center is not open (e.g., after business hours, holidays), emergency notifications such as inclement weather, hurricanes, or other situations that might impact operations.	Yes	
B.13	The contractor must notify PRMP within 30 minutes in the event phone lines are down and an estimated time of recovery to normal operations, for regulatory purposes.	Yes	
B.14	The contractor must maintain a sufficient staff model to provide the services outlined in the contract while meeting or exceeding the applicable service level agreements.	Yes	
B.15	The contractor must establish and maintain a Business Continuity Plan to include the ability for agents to work remotely in the event of an emergency.	Yes	
B.16	The contractor must have internal controls, policies, and procedures in place in compliance with Medicaid policies and procedures.	Yes	
B.17	The contractor must develop and maintain electronic versions of operating policies and procedure manuals for each function identified in the contract. These manuals shall be approved post contract award, and prior to use by the contractor.	Yes	
B.18	The contractor must develop, implement, and maintain a facility security plan that details all elements of security, procedures, security for equipment, controlled access to all Contractor areas, and measures to safeguard the confidentiality of Medicaid information.	Yes	
B.19	The contractor must log all calls.	Yes	
B.20	Contact center agents must log all email inquiries including the date and time of the email, reason for inquiry, resolution reached, agent ID, status, etc.	Yes	
B.21	Contact center agents will respond to email messages, voicemails, and chats, as defined in the service level agreements outlined in the contract.	Yes	
B.22	The contractor will track the number of cases referred to a PRMP case worker/specialist.	Yes	
B.23	The contractor must immediately report to PRMP any personal health information (PHI) breach or HIPAA violation within 24 hours of the incident.	Yes	
B.24	The contractor must provide a transition plan to PRMP six months prior to the end of the contract to help ensure there is a seamless transition from the contractor to another entity.	Yes	

Requirement Description			Vendor Response	
REQ #	Requirement Description	Requirement Met	Vendor Proposed Response	Clarifying Comments
C.1	The contractor will report the maximum occupancy rate of agents.	Yes		
C.2	The contractor will report on contact center operational activities and performance metrics. Reports may include, but will not be limited to:	Yes		
C.2a	Total number of inquiries by type	Yes		
C.2b	Total number of calls by type	Yes		
C.2c	Average call abandonment rate	Yes		
C.2d	Average time calls are in queue	Yes		
C.2e	Percentage of calls that were blocked or received a busy tone	Yes		
C.2f	Average handle time for calls	yes		
C.2g	Number of cases referred to a PRMP case worker/specialist and what percentage of the total call volume represent transferred calls	yes		
C.2h	Quality results of monitored calls	yes		
C.2.i	First contact resolution (FCR) by agent, defined as the percentage of inquiries the agent can address without transferring, escalating, or returning the call	yes		

Vendor Response				
REQ #	Requirement Description	Requirement Met	Vendor Proposed Response	Clarifying Comments
D.1	The contractor will record calls and must inform callers that inquiries may be monitored in real time and may be recorded for training and quality assurance purposes.	Yes		
D.2	The contact center ACD will use pre-approved scripts to ensure quality delivery of services.	Yes		
D.3	The contractor must establish a training program to ensure that staff is adequately trained to handle inquiries from beneficiaries and/or providers.	Yes		
D.4	After initial implementation of the contact center, the contractor must monitor 100% of calls handled by new agents during the first week of the agent taking calls.	Yes		
D.5	The contractor must follow the quality measures for completeness of records, as established by PRMP.	Yes		
D.6	Contact center staff must complete all applicable privacy and security trainings (e.g., HIPAA, etc.) both before implementation of the contact center and ongoing, based on Commonwealth and federal requirements.	Yes		
D.7	The contractor will develop and submit a corrective action for sub-par performance identified in the prior month.	yes		

		Vendor Response		
REQ #	Requirement Description	Requirement Met	Vendor Proposed Response	Proposed Liquidated Damages for Non-Compliance
E.1	Average wait time, prior to the call being answered by agent, must be less than 30 seconds for 90% of calls received	Yes		
E.2	Abandon rate must be 5% or less	Yes		
E.3	FCR must be at least 70% for all calls and chats received from providers	Yes		
E.4	100% of emails must be acknowledged within 2 business days	Yes		
E.5	100% of emails received must be responded to within 5 business days	Yes		
E.6	80% of chats received must be responded to by an agent in less than 30 seconds	Yes		
E.7	Calls must have a quality score of 90% or higher	Yes		
E.8	Call recordings will be provided to PRMP within 5 business days, when requested	Yes		

**LinkActiv, LLC_
Response to Statement of Work
Attachment G
Response Template
RFP-2022-PRMP-MES-ContactCenter-004**



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Provider Enrollment Contact Center Approach

The Vendor should provide a narrative overview of how they will meet the Provider Enrollment Contact Center requirements. The following questions pertaining to Operations, Phone System, Quality, Training, inquiry tracking, software and access, and service level agreements should be answered by the Vendor.

Please use these response sections to provide specific details of the proposed approach to meeting PRDoH requirements in each area. Responses should, when necessary, reference requirements using the appropriate RFQ Requirement Numbers from Section 3 and 4 of the RFQ

Responses for the M&O Requirements Approach should be highly focused on the specific requirements and should not simply provide generic or marketing descriptions of technology or product capabilities. Also, include one (1) or more diagrams where necessary that detail the proposed design and the relationships between key technical components.

1.0 Approach to Operations

The Vendor should ensure that the responses to this section are in alignment with the requirements set forth in **RFP-2022-PRMP-MES-ContactCenter-004**.

Instructions: Describe the vendor's approach to performing these services and meeting the requirements as described in Attachment F: Requirements Traceability Matrix of this RFP.

- 1. The contact center solution must be maintained within Puerto Rico.**
 - a. LinkActiv is a local Customer Engagement provider with over 25 years of experience delivering breakthrough results in the contact center industry. LinkActiv currently has 3 locations across the island. To manage this project, we have two available sites: Guaynabo & Roosevelt Roads, Ceiba; both with brand new facilities. From one original site in Guaynabo, our operation has developed into a multi-site strategy. We currently have 3 sites strategically located within the Island:
 - b. Guaynabo location: employs more than 700 communicators and has 500 working stations, serves more than 15 clients in several industries.
 - c. Aguadilla center holds 26 sqf, 450 working stations and employs 661 communicators.
 - d. Our site located in Roosevelt Roads, Ceiba: holds 400 working stations and employs over 200 communicators.

- 2. The contact center solution must be able answer incoming calls and emails from the provider community and the capability to return provider calls for follow-up.**
 - a. A dedicated operational team composed by an account manager, a supervisor, trainers, quality personnel, and 13 dedicated health care specialized agents will be assigned to ensure all incoming calls, emails, and follow-up calls are answered according to the established KPI's.

- 3. The contact center solution must be available Monday through Friday from 8:00 a.m. Atlantic Standard Time (AST) to 5:00 p.m. AST to answer calls by live agents, except for the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas Day.**
 - a. Our sites have a 24/7 capability and will be available to meet the required schedule.



- 4. The contact center solution must provide a voice message to callers stating the hours of operation during the hours that the contact center is not open.**
 - a. As part of our solution, an IVR system will be available to not only provide a voice message stating the hours of operation, but it can also be configured to deliver additional information or instructions to the customers during the hours the operation is closed, as required by the client.
- 5. The contact center solution must provide a toll-free number available in-state and out-of-state (as associated phone lines).**
 - a. A toll-free number will be provided for in-state and out-of-state (as associated phone lines).
- 6. The contractor shall release and transfer the toll-free telephone number to the owner (PRMP) or a successor contractor upon termination of the contract.**
 - a. We will release and transfer the toll-free telephone number to the owner (PRMP) or a successor contractor upon termination of the contract.
- 7. The contact center solution must include all necessary hardware such as personal computers (PCs), monitors, phone system including telephones, headphones, desks, chairs, etc.**
 - a. Our solutions include all necessary hardware such as: personal computers (PCs), monitors, phone system including telephones, headphones, desks, chairs, training rooms, employee ID's, etc.
- 8. The contact center solution must provide disaster recovery and contingency plans.**
 - a. Please refer to our disaster recovery and contingency plan.



1.1 Attachment D - LinkActiv, LLC Disaster Recovery & Business Continuity Plan

Please refer to included documents.



DISASTER RECOVERY PROCEDURES

LinkActiv will develop customized Disaster Recovery Plan as per specific client needs and requirements.

Overview

The LINKACTIV DRP address three main functional areas

Recovery:

Once the Infrastructure is back in place it will be necessary to recover production data. Since recovery may not be up to the point of failure, it is important to identify any processing that needs to be redone. Can all of the data feeds to the system be identified? How many of them can be redone with 100% certainty of success? It is important to minimize "holes" in data (especially in a distributed processing environment where one step could be dependent on one or more predecessor steps or actions), and then to identify the action to be taken when data inconsistencies are detected. There should be an audit trail for all work performed during this phase. Once the data is recovered there should be some type of validation process (discussed in more detail below) to ensure that the recovery was complete, leaving a consistent work environment.

Restoring / Sustaining Business Operations:

Critical business processing (which may not encompass all application systems) will need to be supported. All processing requirements and service level agreements need to be defined and documented. Dependencies between processes also need to be defined. It is important to document the existing process and then build the plan accordingly. Anything that ran before (in production) will probably need to run again (at the hot site), so scheduling and dependency information is critical. Remember that routine maintenance (including backups) should still be performed at the hot site (it too is an asset that requires protection).

Transferring Data back to Production Servers:

This is one area that is very important. A process needs to be defined to manage this migration. Often the best approach is to execute the DRP on the production servers in order to synchronize the systems to a specific point in time. It should also be noted that this is one of the more difficult tasks to test.

The LINKACTIV DRP address three main technical areas

Hardware Issues:

This includes equipment restoration, configuration (disk capacity, peripheral devices, device names, RAM, file systems and volume groups, OS users, etc.) and operating system version and patch level.

Another issue is deciding whether to use an existing pre-configured machine template or to completely configure a machine (load the OS, initialize and configure disks, TCP/IP configuration, SCSI addresses, everything). There are pros and cons to each scenario. LINKACTIV IT Team approach must be to plan for

9. The contact center must adhere to all federal and Puerto Rico laws and regulations.

- a. Our sites are compliant with all federal and Puerto Rico laws and regulations.

10. The contact center must provide agents fluent in Spanish and English.

- a. We currently have over 1,200 bilingual agents working among our sites. For this project we will provide dedicated bilingual healthcare specialized agents to ensure outstanding service levels, as required by the client.

11. The contact center must be operational by 03/09/20.

- a. Our operations are already prepared to fulfill the requested needs by 03/09/20.

12. The contact center solution must ensure compliance with Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security requirements.



- a. For over 10 years we have been providing contact center solutions for the health care industry. Our sites are compliant and experienced within the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security requirements.

13. Contact center employees must have PR Negative Criminal Record certificate and must successfully complete a drug screening.

- a. As our standard hiring procedure, a background check on the criminal record is made for each candidate. To ensure agent quality a drug screening will be performed, as requested by PRMP.

2.0 Approach to System and Technology

The Vendor should ensure that the responses to this section are in alignment with the requirements set forth in **RFP-2022-PRMP-MES-ContactCenter-004**.

Instructions: Describe the vendor's approach to providing the systems and technology needed for the contact center and meeting the requirements as described in Attachment F: Requirements Traceability Matrix of this RFP.

1. **The phone system must include Automatic Call Distribution (ACD) and must be able to route calls based on type of inquiry (complexity level).**
 - a. Our current system (AVAYA) Includes ACD to route cards accordingly.
2. **The phone system must be able to maintain calls in queue and route according to first in, first out.**
 - a. Our current system prioritizes call accordingly.
3. **The phone system must have the capability for calls to be monitored and recorded for quality and must inform all callers that calls may be monitored and recorded.**
 - a. All calls are recorded and monitored for quality purposes; they are stored as long as the customer requests. At the beginning of the call, it will be standardized to let the callers know, the call is being monitored and recorded for quality purposes.
4. **The phone system must be able to play introductory and informational messages while on hold.**
 - a. Our current system can be adapted to any customized message the client wants to play, while the call is on hold, music, or a combination of both.
5. **The phone system must provide real-time statistics and historical reporting capabilities including: Number of incoming calls, Number of calls answered, Number of abandoned calls, Average wait time (time to answer), Average abandoned time, Highest abandoned time, Total talk time, Total hold time, Average talk time, Average hold time, Daily percentage of abandoned calls and calls answered, number of available agents by time of day and day of week, in hourly increments**
 - a. LinkActiv structures reporting programs custom are designed to each client's information needs. It works on two levels: the first delivers daily KPI results and the second generates monthly business reviews with clients to review results, project management assessment and identifies actions going forward. Critical to the process success is that each project has a timetable and a task leader. On a monthly basis, project goals are transferred to the different components of the operation.

In order to assure project performance and result tracking, the Shared Service department currently delivers **the following reports:**

- **30-minute interval reports**
 - Interval reports (calls metrics, staffing metrics)
- **2-hours interval reports**
 - Summary of daily activities (FE sales, LPS, calls, %SL, LPH, Occupancy)
 - Update leaderboard (sales volume versus goals)
- **Daily reports**
 - Performance reports per queue and idiom (calls metrics, sales metrics, staffing metrics)
 - Customer service representatives and supervisors' scorecard (calls metrics, sales metrics, staffing metrics, attendance, QA scores)



- Closing report (daily stats)
 - **Weekly reports**
 - Supervisors dashboard (track supervisors coaching work in order to assure supervisors spent at least 75% of their time coaching)
 - Staffing reports (FTE tracker, SQI, IDP)
 - Features and Accessories report
 - **Every 15 days**
 - Employee performance (incentive report)
 - **Monthly**
 - Master list
 - Monthly business review
 - **Newly hired training**
 - **Time to competency (TTC)**
- b. **Custom real-time** reports are also available for further reference.
6. **The statistics listed above must be provided electronically in a weekly Comma-Separate Values (CSV) format to PRMP.**
- a. The statistics can be provided as requested, the client must let us know the platform of choice share the information.
7. **The phone system must be capable of providing statistics (such as number of calls answered, talk time, hold time) by the identity of each agent.**
- a. Our current system can provide statistics by each agent's identity.
8. **The contractor must notify PRMP immediately if the phone system is inoperable.**
- a. At LinkActiv we have a robust communications and redundancy plan in place; as a standard procedure, if there are any anomalies among the communication system, we contact the client immediately.
9. **The contractor response to the RFQ must include a detailed description of the proposed ACD system and its capabilities and capacities:**
- a. **ACD System Description**

Call Center Elite Overview and Specification.

Call Center Elite is the Avaya flagship voice product for customer engagement. The product coresides on Avaya Aura® Communication Manager, which is a key component of the Avaya Aura® communications platform.

Communication Manager supports multiple communications protocols, such as H.323 and Session Initiation Protocol (SIP). Communication Manager is configured as an Evolution server to integrate Call Center Elite with traditional circuit switched Time Division Multiplexing (TDM), H.323, SIP, and hybrid environments.

Call Center Elite offers conditional call routing that can be coupled with the following routing options:

 - Greatest Need (GN)
 - Skill Level (SL)
 - Service Level Maximizer (SLM)
 - Service Objective (SO) by Skill or Vector Directory Number (VDN)
 - Service Level Supervisor (SLS) with Call Selection Override and Reserve Agent

Call Center Elite on Communication Manager 6.x and later increases agent productivity by providing resource selection capabilities. For example, Least Occupied Agent (LOA). The following Best Service Routing (BSR) Available Agent strategies that are applied for each VDN:

- First Found Agent
- Uniform Call Distribution-Most Idle Agent (UCD-MIA)
- Uniform Call Distribution-Least Occupied Agent (UCD-LOA)
- Expert Agent Distribution-Most Idle Agent (EAD-MIA)
- Expert Agent Distribution-Least Occupied Agent (EAD-LOA)

Call Center Elite integrates with performance management applications, such as Avaya Call Management System (CMS).

Call Vectoring

Call Vectoring is the process of defining vector programs for call routing and call treatment.

Call vectors are a series of user-defined commands that you can use to route internal or network calls and to determine the treatment for each call. You can route calls to on-network or off-network destinations, or to staffed ACD agents.

Communication Manager directs all incoming calls to an administered VDN which could represent a service category, such as Billing, Customer Service, or Sales. The VDN directs calls to a vector with commands such as announcement, busy, collect digits, goto step, or wait-time for call routing and call treatment.

Expert Agent Selection

Expert Agent Selection (EAS) is a skill-based routing feature that reduces the call transfer and call holding time by matching caller needs with agent skills.

When EAS is set to y, Communication Manager associates each phone with an agent login ID, which is an extension in the dial plan, and not with a skill hunt group. Hence, when an agent logs in, Communication Manager associates the phone with all the skill hunt groups that a system administrator assigns to the agent login ID.

Using Call Center Elite an administrator can assign up to 120 skills to an agent. The administrator can set the call handling preference, that is, administer distribution of calls with the greatest need before skill level under call surplus conditions. Conversely, staffed agents can be moved to handle calls under agent surplus conditions. Agent occupancy and the administered skill levels determine which agents handle calls under agent surplus conditions.

EAS supports a Direct Agent Calling (DAC) capability that a caller can use to speak with a specific agent. Communication Manager prioritizes and delivers a direct agent call before a skill hunt group call. Communication Manager receives the call as an ACD call but delivers or queues the call to the agent and not to a skill hunt group.

3.0 Approach to Quality and Training

The Vendor should ensure that the responses to this section are in alignment with the requirements set forth in **RFP-2022-PRMP-MES-ContactCenter-004**.

Instructions: Describe the vendor's approach to performing these services and meeting the requirements as described in Attachment F: Requirements Traceability Matrix of this RFP.

1. The contractor must establish a training program to ensure that staff is adequately trained on the tools (PEP, MMIS, Provider Secure Portal, Contact Center Management System, Learning Management System (LMS), phone system equipment); PRMP policies; contact center procedures and scripts. PRMP will provide training materials for all tools and policies.

- a. Our agents are carefully selected based on our customer's requirement. We will develop a tailored onboarding & training program to ensure proper training on (PEP, MMIS, Provider Secure Portal, Contact Center Management System, Learning Management System (LMS), phone system equipment); PRMP policies; contact center procedures and scripts. LinkActiv partners with the client to assure a quality Train the Trainer is conducted to accelerate the agents' time to competency in production phase. When the client provides the training materials, LinkActiv trainers may review and provide recommendations on delivery and testing strategies. Based on client's requirements, training materials may be adapted and uploaded to LinkActiv e-learning systems, while protecting copyright/content proprietary rights. LinkActiv understands that providing development opportunities contributes to employee retention and engagement. For that purpose, agent's training needs assessments are identified through quality audits and training activities are programmed according to such results and are executed through different channels such as individual coaching, group trainings or e-learning. Also, a full curriculum for employee development is offered through LinkActiv Academy. These training and incentive programs are attractive due to the effectiveness among the employees' learning curve about new products and services.

2. The contractor must provide facilities for initial training for a period of 3 weeks in San Juan.

- a. All our sites are equipped with training rooms for simultaneous trainings, we also provide healthcare e-learning programs to reinforce training and education. Guaynabo facilities are equipped with 7 available training rooms with a minimum capacity of 25 people and Roosevelt Roads (Ceiba) has 3 training rooms with the same capacity (minimum of 25 people).

3. All scripts must be approved by PRMP prior to use.

- a. As part of our internal process we always request client's approval for all scripts, and training materials before implementation. We also have an in-house specialized resource, available to collaborate and develop tailored scripts, training modules, and workshops as needed. All training programs, schedules, learning modules and materials will be sent to PRMP for approval prior implementation & use.

4. After initial implementation of the contact center, the contractor must monitor 100% of calls handled by new agents during the first week of the agent taking calls.

- a. Dedicated resources will be assigned to ensure quality; 100% of calls handled by new agents during the first week will be monitored by assigned quality agents. For every 2 new hires a dedicated quality agent will be monitoring the calls.



5. The contractor must conduct quarterly quality audits on all staff members and report the results to PRMP.

- a. At LinkActiv, we perform monthly quality audits to ensure optimum project performance. We evaluate our KPI's and compare them with the established goals. On a separate approach, we gather feedback and data we get from caller's surveys performed after every call. All the information is shared with the customer to establish new goals and set the operation towards the caller's benefit.

6. The contact center must provide customer service etiquette training.

- a. The Human Resources department has established an Onboarding Program to enhance the employee experience and accelerate the agent's time to competency. The program provides new employee orientation and guidance through the recruitment, training and production phases during the first 90 days in the job. New employee surveys are conducted in each phase to measure employee engagement and satisfaction.
- b. LinkActiv partners with the client to assure a quality Train the Trainer is conducted to accelerate the agents' time to competency in production phase. When the client provides the training materials, LinkActiv trainers may review and provide recommendations on delivery and testing strategies. Based on client's requirements, training materials may be adapted and uploaded to LinkActiv e-learning systems, while protecting copyright/content proprietary rights. LinkActiv understands that providing development opportunities contributes to employee retention and engagement. For that purpose, agent's training needs assessments are identified through quality audits and training activities are programmed according to such results and are executed through different channels such as individual coaching, group trainings or e-learning. Also, a full curriculum for employee development is offered through LinkActiv Academy. These training and incentive programs are attractive due to the effectiveness among the employees' learning curve about new products and services. They ensure the employee engagement with the brand to provide a flawless execution.

c.

Sample Training Program:

- i. Telephone etiquette
- ii. Monitoring and Quality Controls
- iii. Suggestive Selling
- iv. Customer Service and Sales Best Practices
- v. Writing Skills
- vi. Handling Customer Objections and Handling difficult calls
- vii. Role play with systems and product (along with other representatives taking the training, the training specialist and a supervisor of the campaign)
- viii. Side by side and OJT (On the job training)

7. The contact center staff must be trained annually on HIPAA privacy and security requirements.

- a. As part of our ongoing educational programs, we provide annual trainings to ensure compliance among the healthcare industry regulations such as HIPAA, and security and privacy policies.

8. The contractor shall record all incoming calls for quality control and training purposes.

- a. In LinkActiv we have the capability of recording all incoming calls for quality, control, and training purposes

9. The contractor shall maintain the recordings for up to 6 months from the date of the call.

- a. At LinkActiv we have the capability to save all recordings as long as the client requires.

10. The contractor must provide recordings to PRMP within 5 business days of a request.

- a. Recordings will be provided to the customer upon request within 5 business days.

11. Escalation Process – To ensure customer service

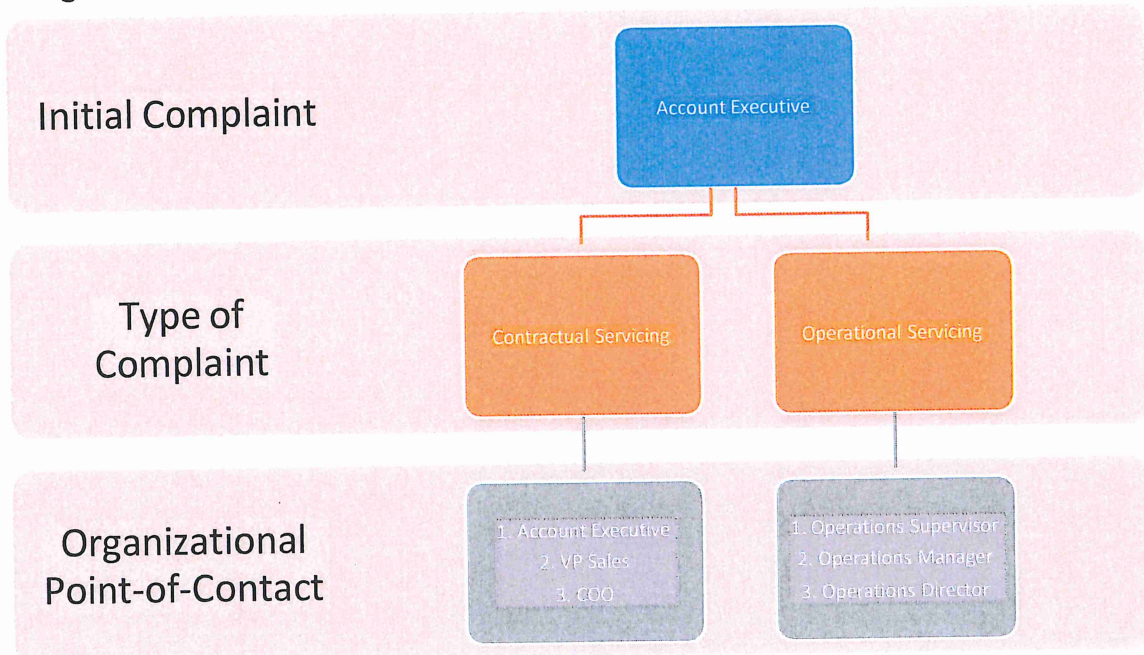
- a. LinkActiv provides guidelines and best practices that are provided to all staff members and policies and procedures for handling complaints.

As a general business practice, all LinkActiv employees must sign a confidentiality and non-disclosure agreements, as a requirement for employment. While this is in place and in order to comply with all contract conditions, CLIENT account staff will be briefed in detail on all contractual agreements with CLIENT. This ensures full account staff understanding of agreements and service expectations.

Besides having all team members informed on contract obligations, also as a general practice, LinkActiv prepares account reviews on a bi-annual basis. All Linkactiv key stakeholders participate actively in preparing these account reviews. This is another way LinkActiv senior staff ensures that all account team members are aligned with strategy and results expected by CLIENT.

General Contract conditions complaints are channeled through the established organizational structure. They are required to be managed within 24 hours of receiving a written communication detailing issue at hand. All complaints are investigated, and investigation results as well as any necessary corrective action, is discussed with client.

3.1.1 Figure 2, Escalation Process





4.0 Approach to Inquiry Tracking

1. **The contact center agents must log all calls into the PRMP Contact Center Management System including the date and time of the call, reason for call, resolution reached, agent ID, and status.**
 - a. Our agents will log all calls into the PRMP Contact Center Management System including the date and time of the call, reason for call, resolution reached, agent ID, and status. Video can be added in order to validate information and transactions. We develop a custom report where we can validate system reports vs the total transactions. The operational team oversees service quality.
2. **The contact center agents must log all email inquiries into the PRMP Contact Center Management System including the date and time of the email, reason for inquiry, resolution reached, agent ID, and status.**
 - a. Agents will be trained to also log all email inquiries into the PRMP Contact Center Management System including the date and time of the email, reason for inquiry, resolution reached, agent ID, and status.
3. **The contact center agent must provide the caller with a reference number for the call or email inquiry.**
 - a. Every time the agents log into the system a reference number is generated, agents will be providing the caller with a reference number for the call or email inquiry, to be addressed through the CRM. The client must indicate how the number will be generated.



5.0 Approach to Software and Access Requirements

The Vendor should ensure that the responses to this section are in alignment with the requirements set forth in **RFP-2022-PRMP-MES-ContactCenter-004**.

Instructions: Describe the vendor's approach to providing the systems and technology needed for the contact center and meeting the requirements as described in Attachment F: Requirements Traceability Matrix of this RFP.

LinkActiv Approach to meeting software and access requirement

Our agents and staff will be able to access the PRMP PEP via the web via Virtual Private Network (VPN), will have access the PRMP Call Center management System (CCMS) via VPN, will be able to access PRMMIS via VPN, will be able to access LMS via the internet and will have access to email.

Our dedicated IT Department and working system provides program integration accessibility, hence LinkActiv will be able to provide the required software and access requirements.



6.0 Approach to Quality and Training - Service Level Agreements

The Vendor should ensure that the responses to this section are in alignment with the requirements set forth in **RFP-2022-PRMP-MES-ContactCenter-004**.

Instructions: Describe the vendor's approach to performing these services and meeting the requirements as described in Attachment F: Requirements Traceability Matrix of this RFP

LinkActiv's approach to meeting SLAs:

In order to comply with the required SLAs, the following program structure is proposed:

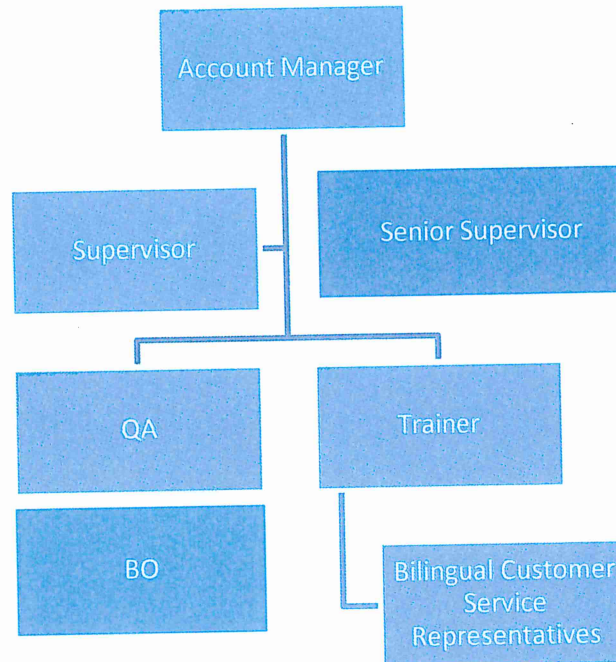
- Bilingual Customer Service Representatives: 74
- Supervisor: 6 (Senior Supervisor – 1, Supervisor - 5)
- Quality: 3
- BO: 1
- Operational Training: 1

Resources that will be initially assigned to the Team are: Account Manager, Supervisor, Bilingual Customer Service Representative, Quality Analyst, BO and a Trainer.

- **Account managers:** the main liaison between LinkActiv and our clients. Some of the Account Manager responsibilities are: Project setup, Strategic direction, KPI monitoring, Report analysis, Client meetings, Business reviews, and Internal w/ Client. These executives accomplish project objectives by planning and evaluating project activities, working in partnership with client management to understand the business requirements for the project, and developing effective working relationships and ongoing management processes. The AMs also define the deliverables, resource requirements, and develop work plans for the project, to manage the development and delivery; they ensure the project is delivered within the financial requirements of the contract. Finally, they estimate and plan projects from start, and the procedures to manage the relationship and delivery of KPI's. A critical role is to manage, monitor, and motivate the cross functional team and multiple country KPI's assigned to the project. They must have previous experience within the contact center environment, a minimum of a bachelor's degree and strong leadership and communications skills.
- **Supervisor (Coach):** Supervisors are always present in the day to day operation. They are trained and prepared to manage any difficult or particular situation with customers, while always looking to meet daily goals by motivating the agents.
- **QA:** Quality Assurance Analyst (QA) is responsible for assessing the quality of the performance of our communicators. The QA will monitor inbound and outbound call and emails responses to assess communicators' demeanor, technical accuracy, customer service performance, and conformity to company policies and procedures. This individual will assist in developing, creating and implementing quality processes and procedures; as well as making recommendation for enhancements to training materials as needed to enhance the overall customer experience.
- **Trainers:** Prepare new sales representatives by conducting orientation to sales process; developing individual coaching plans; providing resources and assistance; scheduling orientation drive-along with senior representatives. They oversee developing individual results by maintaining policy and procedure resources; providing coaching; conducting training sessions; developing outcome improvement resources. Our trainers Improve training effectiveness by developing new approaches and techniques; making support readily available; integrating support with routine job functions.



Figure 1 Proposed Program Structure



List of Deliverables Reports

REQ #	Requirement Description	Frequency
	80% of chats received must be responded to by an agent in less than 30 seconds	Reported Monthly
	Abandon rate will be less than 5%	Reported Monthly
	80% of all inquiries will be resolved in the first call (*)	Reported Monthly
	Overall quality of 95% (*)	Reported Monthly
	Acknowledgement of all provider email inquiries within 2 business days (*)	Reported Monthly
	Resolve all provider email inquiries within 5 business days (*)	Reported Monthly
	Interval report, every 30 minutes (calls received, answered, forecast, AHT, personnel connected every 30 minutes (*)	Reported Monthly
	Operational report, summary of the operational results sent the next day, showing accumulated daily and monthly information (*)	Reported Monthly

- **In-house Command Center Team to develop reports on demand**

(*) Prior to the start of the project we must establish between the parties how these indicators will be measured – in order to comply with the above deliverables, our agents must be a 100% empowered by PRMP and have access and the proper tools to provide the beneficiaries with the needed assistance.



LinkActiv, LLC
Terms and Conditions Response
Attachment H
Response Template
RFP-2022-PRMP-MES-ContactCenter-004

7.8. Attachment H: Terms and Conditions Response

This section describes the Terms and Conditions of the RFP, the PRMPs expectations of vendors, and compliance with federal procedures.

1. Title Page

The vendor should review **Attachment H: Terms and Conditions Response** signing each provided signature block using blue ink in order to note the vendor's acknowledgment and intent of compliance. The vendor should identify any exceptions to the Terms and Conditions. If exceptions are not noted in **Attachment H: Terms and Conditions Response** of the RFP but raised during contract negotiations, PRMP reserves the right to cancel the negotiation if, at its sole discretion, it deems that to be in the best interests of PRMP.

2. RFP Terms and Conditions

RFP Terms and Conditions consist of provisions throughout this RFP. Moreover, these provisions encapsulate instructions, State and federal procedures, and PRMP's expectations of the vendor when submitting a proposal. The vendor should understand and strictly adhere to the RFP Terms and Conditions. Failure to follow any instructions within this RFP may, at PRMP's sole discretion, result in the disqualification of the vendor's proposal.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of these RFP Terms and Conditions.

Javier E. Aviles [Signature]

a. Printed Name / Signature of Authorized Personnel

5/11/22

b. Date

3. Customary Terms and Conditions

The selected vendor will sign a contract with PRMP to provide the services described in the vendor's response. The following documents shall be included in any contract(s) resulting from this RFP:

- **Appendix 2: Service-Level Agreements and Performance Standards**
- **Appendix 5: Proforma Contract Draft** *inclusive of Health Insurance Portability and Accountability Act (HIPAA) Business Associate Agreement*

Please provide a signature stipulating the vendor's acknowledgment, complete review, and acceptance of these documents.

Javier E. Aviles

Printed Name / Signature of Authorized Personnel

5/11/22

Date

If the vendor is NOT taking exceptions to any of PRMP Customary Terms and Conditions, then the vendor needs to provide a binding signature stipulating its acceptance of these documents. If the vendor is taking exceptions to any of PRMP Customary Terms and Conditions, then the vendor should write 'Taking Exceptions' on the line below and should follow the instructions for taking exceptions, as listed in Attachment H: Terms and Conditions Response, Section 6: Exceptions.

Javier E. Aviles [Signature]
Printed Name / Signature of Authorized Personnel

5/11/22
Date

4. Mandatory Requirements and Terms

The following items are Mandatory Terms and Documents. Please be advised, the vendor should provide its affirmative acceptance of these items in order to move forward with consideration under this RFP.

- **Attachment E: Mandatory Requirements**
- Prior to the vendor submission of their proposal, the vendor must be registered with the “Registro Único de Proveedores de Servicios Profesionales” (RUP) from the Puerto Rico General Services Administration (ASG) and with the Puerto Rico Treasury Department (Hacienda) for the collection of sales and use tax (IVU) as a provider (if applicable) in the Unified System of Internal Revenue (SURI). PRMP shall not award a contract, unless the vendor provides proof of such registration or provides documentation from the Puerto Rico Treasury Department that the contractor is exempt from this registration requirement in the SURI system. The foregoing is a mandatory requirement of an award of a contract pursuant to this solicitation. For more information, please refer to the PR Treasury Department’s web site <http://www.hacienda.pr.gov>
- Prior to the Contract resulting from this RFP being signed, the successful vendor must provide a Certificate of Insurance issued by an insurance company licensed or authorized to provide insurance in Puerto Rico. Each Certificate of Insurance shall indicate current insurance coverages meeting minimum requirements as specified by this RFP. A failure to provide a current, Certificate of Insurance will be considered a material breach and grounds for contract termination. A list of the Insurance policies that may be included in this Contract are provided in **Appendix 5: Proforma Contract Draft**.
- A performance bond may be required for the contract resulting from this RFP.
- **Appendix 2: Service-Level Agreements and Performance Standards**
- **Appendix 5: Proforma Contract Draft** inclusive of HIPAA Business Associate Agreement

Vendors that are not able to enter into a contract under these conditions should not submit a bid.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of the Mandatory Requirements and Terms stipulated in this section.

Javier E. Aviles (LEED)

Printed Name / Signature of Authorized Personnel

5/11/22

Date

5. Commercial Materials

The vendor should list any commercial and proprietary materials it will deliver that are easily copied, such as Commercial Software, and in which PRMP will have less than full ownership ("Commercial Materials"). Generally, these will be from third parties and readily available in the open market. The vendor need not list patented parts of equipment.

<Response>

6. Exceptions

The vendor should indicate exceptions to PRMP's Terms and Conditions in this RFP. Any exceptions should include an explanation for the vendor's inability to comply with such term or condition and, if applicable, alternative language the vendor would find acceptable. Rejection of PRMP's Terms and Conditions, in part or in whole, or without any explanation, may be cause for PRMP's rejection of a vendor's Proposal. If an exception concerning the Terms and Conditions is not noted in this response template, but raised during contract negotiations, PRMP reserves the right to cancel the negotiation, at its sole discretion, if it deems that to be in the best interests of PRMP.

The terms and conditions of a vendor's software license, maintenance support agreement, and SLA, if applicable, will be required for purposes of contract negotiations for this project. Failure to provide the applicable vendor terms, if any, as part of the RFP response may result in rejection of the vendor's proposal.

Instructions: Identify and explain any exceptions to PRMP's terms and conditions using the tables provided below, adding tables, as needed. If no changes are listed, the vendor is indicating that no changes to the Terms and Conditions are proposed and that the vendor intends to accept them as written if the vendor's Proposal is selected. Mandatory Requirements and Terms noted in this RFP are non-negotiable.

- The vendor may add additional tables, as appropriate.
- Do not submit vendor's Standard Terms and Contracting Provisions in lieu of stipulating exceptions below.
- Making revisions to PRMP statutes and regulations is prohibited.
- PRMP has no obligation to accept any exception(s).

6.1 Exception #1 – <Insert Title of Provision>

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference To Specific Section Of Vendor's Terms, If Any Provided As Part Of The RFP Response
NOTES/COMMENTS: <FOR PRMP USE ONLY>		

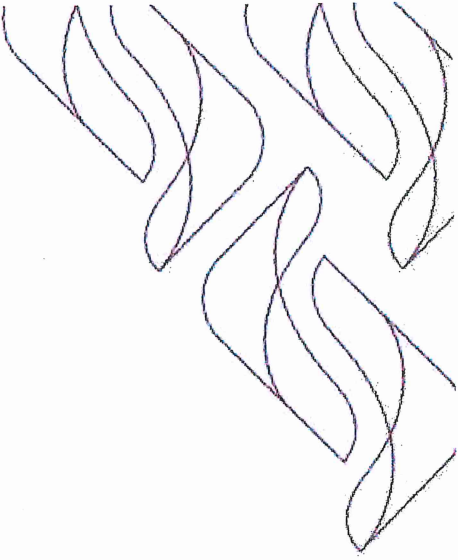
6.2 Exception #2 – <Insert Title of Provision>

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference To Specific Section Of Vendor's Terms, If Any Provided As Part Of The RFP Response
NOTES/COMMENTS: <FOR PRMP USE ONLY>		



Appendix 1

- I. Bios Credential
- II. LLC Disaster Recovery & Business Continuity Plan
- III. Disclosure of Lobbying Activities
- IV. Registro Único de Proveedores de Servicios Profesionales (RUP)
- V. General Services Administration (ASG)
- VI. Puerto Rico Treasury Department (Hacienda)
- VII. Unified System of Internal Revenue (SURI)



Management Bios

Customer Engagement Division

A Grupo Ferré Rangel company





Genaro Herrera Dos Reis

Operations Director



Genaro has over 20 years of experience in the contact center industry across Latin America, including stints at Atento and Telecontacto, and experience with infrastructure projects for telecom providers.

At LinkActiv, he has implemented business strategies that have built the company's market share, increased its revenues and developed accounts. His strategies and operational programs retain clients and increase customer satisfaction, while his cost reduction initiatives promote organization-wide efficiency and productivity.

Customer Engagement Division





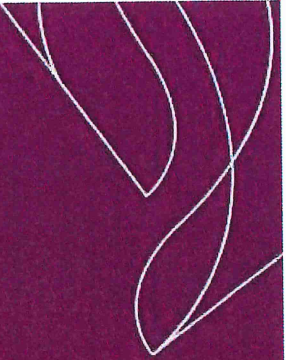
Eduardo Guardiola

Operations & Client Relationship Manager



Eduardo Guardiola has been an Operations and Client Relationship manager at LinkActiv since 2010. Eduardo has over 15 years of experience in Call Center, including managing operations, campaign implementation, adherence to key performance indicators, as well as developing and maintaining client relationship. Before joining LinkActiv, Eduardo managed Call Center operations in the insurance, health, and banking industries.

Eduardo has a Bachelor's Degree in Psychology from the University of Michigan and a Master's Degree in marriage and family Counseling from the University of Phoenix.



Alberto Franco

IT Director



With nearly two decades of network and server infrastructure experience (Microsoft & CompTIA certifications) and 13 years in the call center industry, Alberto continues developing an innovative, robust, and secure information technology environment for LinkActiv's operations.

Some of the strategic technology challenges he faces include tailoring solutions for each client and campaign, allocating resources, establishing information technology protocols, delivering infrastructure and services to four operational sites, and deploying security, compliance, administrative, and customer support systems.



Javier Avilés

Sales & Marketing Director



Over 20 years within the Call Center, marketing, and communications industries in Puerto Rico have given the knowledge to create customized solutions for each customer. Along with an outstanding team of dedicated professionals, Javier generates business intelligence to optimize client resources and handle complex and time sensitive technology projects.

Actively involved developing effective strategies to educate the market about CRM, and best practices in a fast-paced environment, improving results on a daily basis. Avilés is responsible for selling LinkActiv's 360 contact center solutions, customized to our customer needs.

- Key Accomplishment: Javier has developed custom solutions for LinkActiv's customers and partners within the local and US market, positioning the company as the #1 Customer Engagement Solution in Puerto Rico.
- Professional skills: 100% Customer Service skills, Planning, Communication, Leadership & Multi-Cultural oriented.

Customer Engagement Division



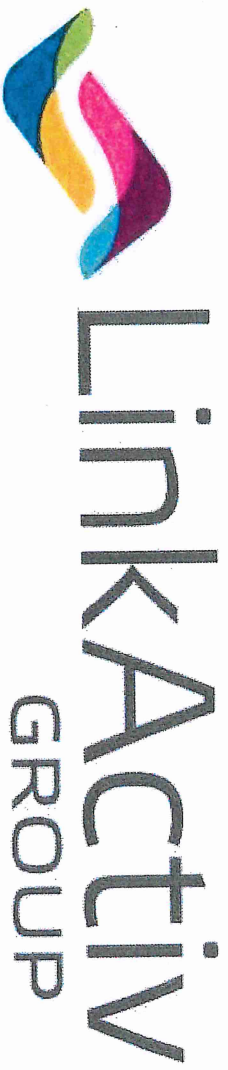


Sylvia Valentin

People Director



With proven experience in Human Resources Management; Sylvia has been known for leading others to reach their potential, while her outstanding negotiation and communication skills have helped her convey ideas and initiatives to maximize and improve talent management.



A Grupo Ferré Rangel company



DISASTER RECOVERY PROCEDURES

LinkActiv will develop customized Disaster Recovery Plan as per specific client needs and requirements.

Overview

The LINKACTIV DRP address three main functional areas

Recovery:

Once the infrastructure is back in place it will be necessary to recover production data. Since recovery may not be up to the point of failure, it is important to identify any processing that needs to be redone. Can all of the data feeds to the system be identified? How many of them can be redone with 100% certainty of success? It is important to minimize "holes" in data (especially in a distributed processing environment where one step could be dependent on one or more predecessor steps or actions), and then to identify the action to be taken when data inconsistencies are detected. There should be an audit trail for all work performed during this phase. Once the data is recovered there should be some type of validation process (discussed in more detail below) to ensure that the recovery was complete, leaving a consistent work environment.

Restoring / Sustaining Business Operations:

Critical business processing (which may not encompass all application systems) will need to be supported. All processing requirements and service level agreements need to be defined and documented. Dependencies between processes also need to be defined. It is important to document the existing process and then build the plan accordingly. Anything that ran before (in production) will probably need to run again (at the hot site), so scheduling and dependency information is critical. Remember that routine maintenance (including backups) should still be performed at the hot site (it too is an asset that requires protection).

Transferring Data back to Production Servers:

This is one area that is very important. A process needs to be defined to manage this migration. Often the best approach is to execute the DRP on the production servers in order to synchronize the systems to a specific point in time. It should also be noted that this is one of the more difficult tasks to test.

The LINKACTIV DRP address three main technical areas

Hardware Issues:

This includes equipment restoration, configuration (disk capacity, peripheral devices, device names, RAM, file systems and volume groups, OS users, etc.) and operating system version and patch level.

Another issue is deciding whether to use an existing pre-configured machine template or to completely configure a machine (load the OS, initialize and configure disks, TCP/IP configuration, SCSI addresses, everything). There are pros and cons to each scenario. LINKACTIV IT Team approach must be to plan for



the worst case (i.e., the complete rebuild). Note: It may be possible to reconstruct the production machine on a new machine using a tape backup. This method does not leave much room for flexibility relative to hardware configuration, but is very fast when compared to a manual system reconstruction.

The key to success is to ensure that DRP machines have at least as much capacity as the production machines that they are replacing, that they are compatible architectures, and that the "designee personnel" has the installation media for the 08 load.

Networking Issues:

What part of the production system must be replicated for the DRP? This environment most likely consists of several machines, and there is a good chance that the environment is not suitable for a total replication. IT Team must try to avoid scenarios where the applications connect to machines using hard-coded IP Addresses rather than hostnames (which is preferable) what other configuration information is required? Are there requirements for connections to an external network (WAN, Internet, Extranet) documented and update? Is there any other type of Client/Server or n-tier activity that will need to be supported? All networking requirements and issues need to be identified, documented, and then addressed in the DRP.

Software Issues:

This is a very broad area that encompasses many things. Software includes the Operating System, user written applications, and third party software (RDBMS, report writers, GUI products, backup/recovery products, scheduling software, etc.). A comprehensive inventory of currently used software, including current version, license information, and support contact information is part of the DRP.

Whenever possible it is preferable to be using current versions of the products in production (for improved product support). It is also desirable to have the installation media, installation guide/notes, licensing information, support information, and current configuration information available for these products (all of which is critical for rebuilding the installation).

Regarding custom applications, it is desirable to have the source code, libraries, and "make" files in addition to the executable code. There is always the chance that the application will need to be recompiled due to version incompatibilities, bad executables, path changes, etc.

Creating the Procedures that Support the DRP

Execution of the plan will be stressful and people may forget simple, everyday things. Also, resources/staffing may change and the people assigned to execute the DRP may not be familiar with it. The use of the DRP session checklists is very desirable. These lists should have sections for a timestamp, initials of the person doing the work, and room for comments. This information will be critical if a problem is found downstream.

Despite the fact that the complete IT Team is part of the disaster recovery efforts a single person should be identified as a DR Coordinator (the IT Director), with a backup person identified to fill-in if necessary. The IT Director will be responsible for monitoring each phase of the DRP, coordinating with the various groups involved with executing the DRP, and providing status information to the Management of LINKACTIV during DRP execution. Resources should be identified within each department or LINKACTIV functional area as being responsible for each and every task and procedure, and they should know exactly what is expected of them. Again, nothing should be left to chance!

Data should be gathered during testing (e.g., reports, screen prints, transaction logs, etc.) and saved for future review. In the event of problems that data may help the team make a root cause determination regarding the problems that it can be corrected. If everything goes right it provides the necessary documentation to support an external validation effort of the DRP exercise. The only way to really know if "everything worked" is to know what "everything" is, and then to be able to demonstrate that the necessary tasks were completed successfully!



Disaster Recovery Check List

1) Maintenance of the disaster recovery plan

- Establish a disaster-recovery team of employees who know your business best, and assign responsibilities for specific tasks.
- Identify your risks (kinds of disasters you're most likely to experience).
- Prioritize critical business functions and how quickly these must be recovered.
- Update and test the plan at least annually.

2) Alternative operational locations

- Determine which alternatives are available.
- For LINKACTIV the most suitable alternative is the APEX facilities

3) Validate status of the Backup site.

- Power generators.
- Computers and software.
 - Critical computer data files (payroll, accounts payable and receivable, customer orders, inventory).
- Phones/radios/TVs.
- Equipment and spare parts.
- Vehicles
- Digital cameras.
- Common supplies.
- Supplies unique to your business (order forms, contracts, etc.).
 - Basic first aid/sanitary supplies, potable water and food.

4) Safeguard the LINKACTIV property

- The building
- The equipment
- The computer systems
- The company and customer records
- Other company assets

5) Contact information

- Keep current and multiple contact information (e.g., home and cell phone numbers, personal e-mail addresses) for: — Employees
- Key customers
- Important vendors, suppliers, business partners
 - Insurance companies

6) Communications



- LINKACTIV must have access to multiple and reliable methods of communicating with your employees:
- Emergency toll-free hotline - Yes
- Website - Yes
- Cell phones - Yes
- BlackBerry(TM) - Yes
- -Two-way radios - Yes
- Internet - Yes
- E-mail – Yes

7) Employee preparation

- Make sure LINKACTIV employees know:
- Company emergency plan.
- Where they should relocate to work.
- How to use and have access to reliable methods of communication, such as satellite/cell phones, e-mail, voice mail, Internet, text messages, BlackBerry(TM), PDAs.
- How they will be notified to return to work.
- Emergency company housing options available for them and their family.

8) Customer preparation

- Make sure LINKACTIV key customers know:
- Your emergency contact information for sales and service support (publish on your website).
- What to expect from your company in the event of a prolonged disaster displacement.

9) Evacuation order

When a mandatory evacuation is issued, be prepared to grab and leave with critical office records and equipment:

- Company business continuity / disaster recovery plan and checklist.
- Insurance policies and company contracts.
- Employee payroll and contact information.
- Desktop/laptop computers.
- Customer records, including orders in progress.
- Photographs/digital images of your business property.
- Post disaster contact information inside your business to alert emergency workers how to reach you.
- Secure your building and property.

10) Cash management

Be prepared to meet emergency cash-flow needs:

- Keep enough cash on hand to handle immediate needs.



- Use Internet banking services to monitor account activity, manage cash flow, and initiate wires, pay bills.
- Issue corporate cards to essential personnel to cover emergency business expenses.

11) Post-disaster recovery procedures

- Consider how your post-disaster business may differ from today.
- Plan whom you will want to contact and when.
- Assign specific tasks to responsible employees.
- Track progress and effectiveness.
- Document lessons learned and best practices.



Attorneys
and Counselors
at Law

Néstor J. Navas D'Acosta, Esq.
E-mail: nnavas@nrlawpr.com

May 9, 2022

Government of Puerto Rico
Department of Health
Medicaid Program
World Plaza Building
268 Luis Munoz Rivera Avenue
Suite 501
San Juan, Puerto Rico 00918

Re: **Negative Certification**
RFP-2022-PRMP-MES-ContactCenter-004.
8.4. Appendix 4: Disclosure of Lobbying Activities (Vendor Only)

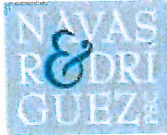
Ladies and Gentlemen:

Please be advised, that LinkActiv, LLC ("LinkActiv"), a Puerto Rico limited liability company, has requested that in my capacity as outside legal counsel of the entity, I perform an evaluation of the corporate records of the limited liability corporation and the contracts of the entity with the purpose of certifying that LinkActiv has not hired any corporation, nor person to perform lobbying activities on its behalf. Furthermore, to certify that that no member or employee of the limited liability company are engaged in this type of activity or act as a lobbyist.

After evaluating the corporate records of the company and its contracts, I hereby certify that LinkActiv has not hired any corporation, nor person to perform lobbying activities on its behalf. Furthermore, to certify that that no member or employee of the limited liability company are engaged in this type of activity, or act as a lobbyist. I render this certification in my capacity as an attorney at law and a member of the Bar of the Commonwealth of Puerto Rico, member of the First Circuit Court of Appeals and member of the United States Supreme Court of America

This certification is solely for your benefit and the benefit of LinkActiv, in regard to RFP-2022-PRMP-MES-ContactCenter-004. It may not be quoted or relied upon by, or published or communicated to, nor copies be delivered to, any other person for any other purpose whatsoever,

1225 Ponce de Leon Avenue, VIG Tower, Suite 1005, San Juan, Puerto Rico 00907
Telephone (787) 724-2097/Facsimile (787)724-2161



Attorneys
and Counselors
at Law

without our prior written consent in each instance. Upon your written request, we will furnish reliance letters to any of your successors and assigns or any participant stating that each such party may rely on this certification letter, as if this certification was originally addressed to them, after verifying the certification still complies with the validity requirements of the documents.

Cordially,

Néstor J. Navas D'Acosta, Esq.

1225 Ponce de Leon Avenue, VIG Tower, Suite 1005, San Juan, Puerto Rico 00907
Telephone (787) 724-2097/Facsimile (787)724-2161



Gobierno de Puerto Rico
Administración de Servicios Generales
Registro Único de Licitadores

CERTIFICADO DE ELEGIBILIDAD

FECHA DE EXPEDICIÓN

28 de octubre de 2021

NÚMERO DE CERTIFICACIÓN

202102792

FECHA DE VENCIMIENTO

28 de octubre de 2022

Nombre del Licitador: LINKACTIV, LLC

Numero de Licitador: 3195

Dirección Postal: P. O. BOX 366398 , SAN JUAN
PR, 00936

Teléfono: 7876410101 /

Correo Electrónico: JAHAIRA.ADAMES@GFRPR.COM

PERSONAS AUTORIZADAS A FIRMAR	
NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
MIGUEL OSORIO	CEO
GENERO HERRERA	DIRECTOR DE OPERACIONES
SYLVIA VALENTIN	DIRECTORA DE RECURSOS HUMANOS

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del licitador antes de adjudicar cualquier procedimiento de adquisición, órdenes de compra u otorgar contratos. Así como el de garantizar que el licitador puede proveer los bienes y servicios no profesionales conforme las normas que lo regulan.

ADVERTENCIA: Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico.



Validación: <https://serviciosenlinea.gobierno.pr/validaciónelectrónica/>, debe usar el número de certificado como código de validación



Gobierno de Puerto Rico
Administración de Servicios Generales
Registro Único de Proveedores de

Servicios Profesionales

CERTIFICADO ÚNICO DE PROVEEDORES

FECHA DE EXPEDICIÓN

2 de mayo de 2022

NÚMERO DE CERTIFICACIÓN

202211419

FECHA DE VENCIMIENTO

2 de mayo de 2023

Nombre del Proveedor: LINKACTIV,LLC

Número de Proveedor: 3195

Dirección Postal: PO Box 9227512 San Juan, PR 00922

Teléfono: (787) 641-0101

Correo Electrónico: jahaira.adames@gfrpr.com

PERSONAS AUTORIZADAS A FIRMAR

NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
Pedro Zorrilla Zorrilla	CEO
Francisco Brigantty Merced	COO

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del proveedor antes de otorgar cualquier contrato. Así como el de garantizar que el proveedor pueda ofrecer los servicios profesionales conforme a las normas que lo regulan.

ADVERTENCIA: Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico.



Validación: <https://validacion.pr.gov/>, debe usar el número de certificado como código de validación

Gobierno de Puerto Rico
DEPARTAMENTO DE HACIENDA
Área de Rentas Internas



Certificación de Radicación de Planillas

LINKACTIV, LLC.
PO BOX 366398
SAN JUAN PR 00936-6398

Fecha: 05 abril 2022
ID de Contribuyente: 04981-14560
ID de Correspondencia: L0900608576

Este Comerciante **ha cumplido** con la radicación de sus Planillas Mensuales de Impuesto sobre Ventas y Uso y/o Planilla Mensual de Impuesto sobre Importaciones.

ADVERTENCIA:

De no estar de acuerdo con esta información, deberá presentar su reclamación acompañada de la evidencia correspondiente en uno de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la localización de los SAC, puede acceder a www.hacienda.pr.gov. Si tiene preguntas relacionadas a este documento, puede comunicarse al Centro de Contacto Hacienda Responde al (787) 622-0123.

VALIDACIÓN

Para verificar si este Certificado es válido, acceda <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".

Vigencia: Este Certificado es válido hasta 30 días después de la fecha de emisión.

Gobierno de Puerto Rico
DEPARTAMENTO DE HACIENDA
Área de Rentas Internas



Certificación de Deuda

LINKACTIV, LLC.
PO BOX 7512
SAN JUAN PR 00916-7512

Fecha: 05 abril 2022
ID de Contribuyente: 04981-14560
ID de Correspondencia: L0133943872

Certifico que el contribuyente identificado en la parte superior de este documento no tiene deudas por ningún concepto incluyendo contribución sobre ingresos al día 05 abril 2022 en nuestro sistema.

IMPORTANTE:

De estar de acuerdo con esta información: deberá realizar el pago a través de SURI <https://suri.hacienda.pr.gov> a la mayor brevedad posible para así evitar la acumulación de intereses.

De no estar de acuerdo con esta información: deberá presentar su reclamación acompañada de la evidencia correspondiente en cualquiera de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la ubicación de estos centros, puede acceder a www.hacienda.pr.gov. Sí tiene preguntas relacionadas a este documento, puede comunicarse con nuestro Centro de Llamadas Hacienda Responde al (787) 622-0123.

VALIDACIÓN:

Para verificar si este Certificado es válido, acceda <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".

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