

**REQUEST FOR PROPOSALS (RFP)**

**STATE OF MARYLAND  
DEPARTMENT OF HUMAN SERVICES  
CUSTOMER SERVICE CENTER  
OS/CSC-22-001-S**

**AMENDMENT # 5  
September 1, 2023**

Dear Prospective Offerors:

This amendment is being issued to amend certain information in the above-named RFP. All information contained herein is binding on all Offerors who respond to this RFP. Specific parts of the RFP have been amended. The changes are listed below. New language has been double underlined and marked in **bold** (i.e. word), and language that has been deleted has been marked with a strikethrough (i.e. ~~word~~).

1. **The RFP is being substantially revised to now require the Contractor to develop, customize, implement and maintain the CRM, ACD and IVRS applications needed for the Call Center. Any product developed by the Contractor shall be for the benefit of DHS and shall be delivered to DHS at the end of the Contract term.**
2. **All references to DHS providing the CRM, ACD and IVRS are deleted by this reference.**
3. **All responses to questions regarding DHS as the developer and functionality of the DHS CRM, ACD and IVRS should be ignored per this Amendment. Also, questions which have been submitted but not answered involving DHS as the developer of the CRM, ACD and IVRS are no longer applicable in light of this Amendment and will not be answered. The Contractor's requirements for developing and maintaining the CRM, ACD, and IVRS are contained in the RFP.**
4. **A revised RFP will be published with the sections that have been revised through Amendment 5 and additions will be indicated in 'bold' and 'underline'. The Price Sheet will also be revised.**

**The following revisions will be made:**

5. **Revise paragraph 5 of Section 2.2:**

The Contractor will have access to DHS' existing toll-free telephone number for both in-state and out-of-state callers. The toll-free number will not be transferred to the Contractor. **The Contractor will need to implement and manage an IVRS for this Contract.** ~~In addition, the Contractor will have access to the DHS IVRS.~~ The initial point of contact for all telephone inquiries will be through an IVRS. The Contractor will work with DHS Administrations in understanding, developing, and implementing appropriate call tree structures and scripts. The IVRS will include automated services to enable the State to deliver unattended services 24 hours a



day, 7 days a week, 365 days per year (366 days for leap year), in accordance with DHS approved scripts and routing paths; input options via telephone touch-tone pad and voice commands to access pre-recorded information (SEI); and speech recognition (speech -to text and text-to -speech technologies to enhance efficiency and customer service. Finally, the Contractor will **need to implement and manage a** ~~utilize the Department's~~ Customer Relationship Management System (CRM) to document customer inquiries and, as necessary, forward work orders to LDSS. ~~Both the DHS CRM and IVRS tools will be available to the Contractor to utilize and will need to be managed during the Contract period.~~

**6. Delete Section 2.2.3.C.**

~~C. Grant necessary access and training to the DHS CRM to allow the Contractor to perform duties included in this RFP.~~

**7. Revise Section 2.3.1.A. as follows:**

A. Implement and manage a CSC to handle inbound and outbound calls for the Department, which incorporates **Contractor-provided** ~~the Department's~~ IVRS, **ACD** and CRM.

**8. Revise paragraph 1 of Section 2.3.2:**

The initial point of contact for all telephone inquiries will be through an IVRS. **The Contractor shall provide the IVRS for this Contract. The IVRS shall be both traditional and conversational / dynamic.**

**9. Add H and I to Section 2.3.2**

H. **The Contractor shall ensure that the IVRS integrates to the MD THINK-hosted DHS applications (CJAMS, CSMS, E&E, etc).**

I. **The Contractor shall also provide that the IVRS is an industry standard product that allows for transferability of the IVRS data and system to MDTHINK (or be host-able by MDTHINK) or to another vendor at the end of the Contract.**

**10. Add Section 3.2.7.**

**3.2.7. The Contractor shall transfer the CRM data and system to MDTHINK or to another vendor during the Transition-Out period.**

**11. Revise Section 2.3.3:**

**The Contractor shall provide a vendor-hosted CRM for this Contract, which provides user access or licenses for approximately three thousand two hundred (3,200) users as designated by DHS. The Contractor shall ensure that the CRM integrates to the MD THINK-hosted DHS applications (CJAMS, CSMS, E&E, etc). The Contractor shall also provide that the CRM is an industry standard product that allows for transferability of the CRM data and system to MDTHINK (or be host-able by MDTHINK) or to another vendor during the Transition-Out period.**

The Contractor shall:

- A. Train staff on the functions of the ~~DHS CRM, a web-based system.~~
- B. Use the CRM to record and update basic Customer information within the CRM, track all calls, activities, and operations of the CSC and use the data to identify Customer inquiry trends.
- C. Ensure CSRs use ~~DHS~~ the CRM as the primary system for all CSC activity.
- D. Determine secured role-based privilege settings of staff, while adhering to ~~DHS~~<sup>2</sup> CRM user access roles capabilities. The Contractor shall ensure that DHS Security Monitors have the ability to reset user access based on the user's security profile and staffing level.
- E. Utilize scripts in the CSC provided by DHS programs. DHS will maintain control of the scripts/and or desk guides for dissemination.
- F. Forward Work Orders that are generated in the CRM when the Customer inquiry needs additional follow-up from DHS staff/LDSS are forwarded to local offices. The Contractor shall ensure that the service requests and Work Orders are consistent and have uniform narrative per the Administration Desk Guide.
- G. NOT delete any records in the CRM. Please refer to Section 24 of Attachment M.
- H. Ensure that the CRM system has Dashboard, Business Intelligence and visualization capabilities.

**12. Revise Section 2.3.4. as follows:**

**2.3.4. Automated Call Distribution (ACD) and Automated Dialer System**

The Contractor shall provide an ~~a DHS will provide access to the Contractor to the Department's ACD~~ system, which has the capability to distribute incoming calls to CSRs. Call routing is based on sequence of arrival/origination, inquiry type, CSR availability, skills, and language fluency or other pre-defined routing instructions.

The Contractor shall:

- A. Comply with call routing and queuing based on specific requirements of DHS and the IVRS.
- B. Use the ACD to gather and report statistics in real-time, to include number of calls in queue, current hold time, maximum hold time, abandoned/dropped calls, average wait time, call volumes, live Customer calls, and any CSC activity at all times. The Contract Monitor and designees shall have access to the ACD at any time and without prior notice.
- C. Provide Customers with an estimated wait time and other recorded messages. Estimated wait time shall be offered at the beginning of hold time and repeated at various increments. The Callers must be given option to stay in queue or select the Call-back option during Normal Business Hours. The ACD shall prompt the caller to provide the Call-back information and provide an estimated Call-back time to the caller.

- D. Ensure that Outbound Calls to callers opting for a Call-back are made at the estimated Call-back time. If the Call-back encounters a busy or no-answer condition, the Contractor shall repeat the Call-back for up to 2 additional attempts within two (2) Business Days. If the Call-back encounters a voicemail or answering service, leave a brief message indicating the purpose of the call with information on how to contact the CSC and no additional Call-back is required.
- E. Record all calls by CSRs and provide audio recordings of individual/Customer calls for review by the Contract Monitor no later than one (1) Business Day of the request.
- F. Provide alerts to the CSC Managers/Supervisors when the call center experiences unforeseen or drastic changes and anomalies in the CSC operational patterns, such as persistently long hold times, persistent call drops, persistent voice distortion, etc., that needs attention and intervention.
- G. Monitor CSR performance utilizing industry standard practices including ‘listen’, ‘record’, ‘workgroup alert’, ‘transfer’, ‘join’, ‘whisper coaching’ and ‘grab’ methods.
- H. **Provide automated outbound calling capabilities including preview, progressive and predictive dialers, campaign management, and call-back assistance reports.**

**13. Revise Section 2.5.1.:**

2.5.1. Chatbots and Digital Assistant (Fixed Price/T&M)

The Contractor shall provide as an optional service to be accepted at DHS’ discretion the ability to provide **Short Messaging Service (SMS)**, a Chatbot and ~~Digital Assistant~~ **Virtual Agent** to assist Customers across multiple platforms and be available 24 hours a day and 7 days a week. At a minimum, the DHS programs shall have the ability to update or change information provided by **the SMS**, the chatbot or ~~digital assistant~~ **Virtual Agent** at any time. In addition, certain levels of authentication for Customers as determined by DHS may be instituted based on DHS’s needs at any time.

**14. Revise 2.3.11.J.:**

Provide controls for testing new data and maintain the ~~DHS~~ IVRS Control Log.

**15. Delete Section 5.2.6.A.1 as follows:**

~~1) Technical Proposal and all supporting material in Microsoft Word format, version 2007 or greater,~~

**16. Revise Key Information Sheet as follows:**

<b>Questions Due Date and Time</b>	<del>8/22/2023</del> <b><u>9/8/2023</u></b> 5:00 PM Local Time
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**17. Revise the chart in Section 2.6.9. as follows:**

1	CSR Queue Wait Time	Maximum wait time in CSR Queue.	Calls answered within 30 seconds > 90%	<del>0.5%</del> <b><u>3%</u></b>
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14	Customer Satisfaction	Rate the quality, timeliness, and other service delivery elements carried out by the CSC. Criteria for consistent quality of Customer satisfaction a. Exceeds Expectations b. Meets Expectations c. Below Expectations	Monthly random sampling and survey results of Meet or Exceeds > 80%	<del>N/A</del> <u>2%</u>
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**18. Revise Appendix 5 as follows:**

#	System Name	Brief Description
1	Electronic Payment Processing Information Control (EPPIC) system	The Electronic Payment Processing Information Control (EPPIC) system is an application used to streamline the business of administering DTA program payments made to clients through an Electronic Benefit Transfer (EBT). Each EBT card is associated with a DTA case and is linked in EPPIC by a unique case number.
2	DHS Dashboard - Eligibility and Enrollment (E&E) Office of Home Energy Program Data Management System (OHEP), Child Support Management System (CSMS)	<p>The Eligibility and Enrollment (E&amp;E) is an application developed as part of the MD THINK shared technology platform that supports the DHS Family Investment Administration programs such as Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), Non-Modified Adjusted Gross Income (MAGI) Medicaid, including Long Term Care. The system was designed to modernize the technology our Maryland customers use to apply for social services (Consumer Portal) and the system our employees use to process those applications to determine eligibility (Worker Portal). The two portals and the rest of the E&amp;E system work together to deliver efficient and effective customer service to the citizens of Maryland.</p> <p>The OHEP Data Management System is a central web-enabled database application provided to OHEP authorized users. Employees or volunteers of LAAs may become an authorized user of the system by submission of a request for username through the DHS Sailpoint Security system. Agencies not connected to the DHS network are to access the OHEP Data Management System by DHS's Virtual Private Network (VPN). A separate login and password are required for access.</p> <p>The CSMS is a web-based application that maintains a database of information pertaining to child support cases registered in the State of Maryland. CSMS also interfaces with state, federal and private agencies for registering child support cases (Intake), locating parties to child support cases (Locate), establishment of paternity and child support (Establishment), enforcement of child support and medical support court orders (Enforcement), and collecting and disbursing payments (Fiscal).</p>
3	ManageEngine - ADSelfService Plus	ADSelfService Plus is an identity security solution that can put an end to many cyberattacks, save IT costs, and kick-off your Zero Trust journey. With ADSelfService Plus, you can secure multiple IT resources

		including identities, machines, and VPN, reduce the burden on IT help desks, empower users with self-service capabilities, and gain 360 degree visibility and control over identities spread across on-premises, cloud, and hybrid environments.
4	<del>MD DHS CSC Maryland DHS Customer Relationship Management (CRM) Home</del>	<del>This system has been developed by DHS to manage all client contacts between the CSC and clients. CRS will use this system to document client interactions, the reason for calls, resolutions, and escalations to the appropriate LDSS office.</del>
5	myMDTHINK Portal	This portal provides client access to the Department by providing the ability to gather information and use a number of self service tools to apply for and track the status of various services and benefits provided by DHS.
6	<del>Interactive Voice Response System (IVRS)</del>	<del>This system manages the flow of calls coming into the CSC by providing clients with a robust menu of options that help direct calls to information on demand and/or the CSR best suited to assist the client.</del>

**19. Revise Question 48 as follows:**

Question 48: Section 2.3.4-E - Please confirm the call recording solution is provided by DHS?  
**Response: Yes. The Contractor will be responsible for call recording.**

**20. Revise Question 56 as follows:**

Question 56: Section 2.6.2 - Please indicate the systems that the Contractor is responsible for problem tracking, severity assignment and incident reporting.  
**Response: The IVRS, ACD and CRM as well as any other Contractor systems.**

**21. Revise Question 78 as follows:**

Question 78: Section 5.2.6.A-1 - Would the State consider removing item 5.2.6.A.1 requiring responses in Word format to allow bidders to upload files not available in Word format?  
**Response: ~~The State prefers to keep this requirement.~~ Due to multiple requests from Offerors, this submission requirement is waived. Please send us a PDF version of your Proposal preferably in one file.**

**22. Revise Table in Section 3.10.2 as follows:**

5	<del>DHS CRM Helpdesk Support</del>	<p><b>Responsibilities include:</b></p> <p>The Contractor shall provide a <del>DHS CRM Helpdesk Support</del> to be responsible for the following activities that include, but are not limited to providing <del>DHS helpdesk support functions of the DHS CRM.</del> <del>The DHS CRM uses the Salesforce platform.</del> The <del>DHS CRM</del></p>
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	<p>Helpdesk Support will be responsible for maintaining the functionality, onboarding/offboarding of users as <del>determine</del> <b>determined</b> by DHS and general helpdesk functions for DHS users of the <del>DHS</del> CRM.</p> <p><b>Minimum Qualifications</b></p> <p>The Contractor's <del>DHS</del>-CRM Helpdesk Support Position(s) shall possess a Bachelor's degree from an accredited college or university in Information Technology, Computer Science, Management Information Systems, or other information technology related field and three (3) years of experience in a business IT environment with emphasis on PC computer hardware and applications. General experience includes, but is not limited to: information systems development, work in the client/server field, or related fields.</p> <p><b>Preferred Qualifications</b></p> <p>The Contractor's <del>DHS</del> CRM Helpdesk Support Position(s) shall have experience designing, developing, gathering, coding, reporting and maintaining CRM <del>Salesforce</del> platform. <del>The DHS CRM Helpdesk Support Position(s) should be a Salesforce certified Administrator.</del></p> <p>Substitution of experience for education may be permitted at the discretion of the Contract Monitor. Experience on a year for year basis may be substituted for required education.</p>
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If you require clarification of the information provided in this amendment, please contact me at (410) 767-7404, or via email at [sang.kang@maryland.gov](mailto:sang.kang@maryland.gov).

**Sang Kang, Procurement Officer**  
**September 1, 2023**