ADDENDUM 4

Date: August 16, 2016

Project: Call Recording System

RFP: UTP-CRS

To: Prospective Proposers

This Addendum 4 forms part of and modifies the Request for Proposal UTP-CRS (RFP) issued July 15, 2016 with amendments and additions noted below.

1. **Section 5 will be deleted in its entirety and replaced with the following.**

**AMENDED SECTION 5**

**SPECIFICATIONS AND ADDITIONAL QUESTIONS**

**5.1 General**

UTP has a need to record calls from patients to the UTP Call Center and Nurse Triage. There is currently no system in place to do this task.

UTP currently has more than 700 agents as part of our ACD system. Today only 300 agents can be logged into the system at one time; the successful vendor must have a scalable solution that can be upgraded in a timely manner to handle additional recordings.

The System must be able to record calls for the UTP Call Center and the Nurse Triage Center. Initially, the System will only be implemented for the UTP Call Center and the Nurse Triage Center. The Call Center currently has 60 agents and is planning to add 40 agents within one year. The Nurse Triage Center has 25 agents and is expected to grow by 20%.

UT Physicians is looking for a vendor that can provide a cloud hosted call recording system.

**5.2 Scope of Work**

UTP is soliciting proposals from qualified vendors to provide a Cloud Hosted Call Recording System (“The System”).

***Functional Requirements***

* Auto record all calls

The system must have the ability to auto-record all calls for all phone extensions that are programmed through the user interface. The system must provide the ability to add and remove user extensions without vendor intervention.

* Cataloging and easy retrieval of messages

The system must provide a flexible, user definable cataloging solution that has the ability for us to define how we would like to catalog calls.

Calls must be capable of being cataloged by user, date, time, calling number, 3 or more customizable fields, and standard field sets specified in the HL7 standard (Patient First, Patient Last, DOB, MRN, Account # etc.) to allow UTP to catalog a specific call to a specific patient.

* Basic and advanced search capabilities

The system must provide the end users with the ability to do basic searches with pre-defined searches but also give us the ability to do custom searches.

Queries created under the custom search option must be able to be saved.

* Ability to identify the type of call received

The successful solution must provide us with an interface so the user can easily identify the call type from a menu of definable call types.

The ability to have definable call types must include by department.

* Ability to run (basic and custom) reports in the system

The system must come with some pre-defined reports but must also give us the ability to setup and run custom reports.

The system must have the ability to have a complete audit trail with time/date stamp information for each call showing all subsequent activity (who listened to the call, who added comments, etc.).

* Compatibility with our existing Avaya phone system and ACD system

The system must work with our existing voice platform which includes Avaya Call Manager 6.2, Avaya Centervu Supervisor 16.3 and AVST voicemail 8.2.

* Vendor must provide 24/7 support
* Vendor must provide a three year maintenance contract as part of offering
* System must be HIPPA and PCI compliant
* Vendor must provide references (name and contact information) of at least 3 customers of comparable size to UT Physicians
* System must have Disaster Recovery capabilities
* Provide documentation on your system DR capabilities
* Provide a design topology document
* Provide VMWare compatibility documentation
* The system must have the ability to create custom scorecards and generate reports from the scoring data created.
* The system must also include a notifications feature that allows a user to notify the supervisor alerting him/her to listen to it and offer advice/assistance, for example, to a particular call with an electronic notification initiated by the user.
* A physical or virtual call collector server integrated with the PBX/ACD is acceptable on premise if needed.

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| --- | --- | --- | --- | --- | --- |
| Monthly Avg. Inbound Call Data | | | | | Monthly Avg. Outbound Calls |
|  | Answered Calls | Abandoned Calls | Calls Received | Call Duration2 (Answered Calls) |
| Call Center1 | 59,334 | 4,015 | 63,349 | 2:40:06 | 4,300 |
| Nurse Triage1 | 7,612 | 1,909 | 9,521 | 3:23:43 | 1,700 |

1 Inbound data covers a time period of seven months (Oct 2015-April 2016)

2 Call duration in minutes

***Optional Workforce Management Feature***

As an option, UTP requests the proposal to include the pricing with the added capability of a workforce management feature.

***Optional Expansion to all UTP clinics***

As an option, UTP requests the proposal to include the pricing to expand the System to all of the UTP clinics located at roughly fifty (50) separate sites. These sites are either standalone, in the professional building or in retail shopping center locations. Within these 50 sites, there are a total of ninety-eight (98) individual clinics with a total of 200 employees that would need to be monitored.

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| --- | --- | --- | --- | --- |
| Monthly Avg. Inbound Call Data | | | | |
|  | Answered Calls | Abandoned Calls | Calls Received | Call Duration4 (Answered Calls) |
| UTP Clinics3 | 111,421 | 10,188 | 121,609 | 1:52:00 |

3 Inbound data covers a time period of three months (Mar-May 2016)

4 Call duration in minutes

**5.3 Questions Specific to this RFP**

Proposer must submit responses to the following questions below as part of Proposer’s proposal:

***Company Experience***

1. What is your experience in the healthcare industry similar to UTP?
2. How long have you been in business providing call recording systems?
3. Please provide the resumes of the team that would be assigned to the project.
4. Please provide a list of clients with an implementation similar to UTP.

***Functional Requirements – Minimum***

1. What format is the voice data stored, WAV, MP3?
2. What is your system storage capacity?
3. Depending on how long the data needs to be kept, what is the projected amount of storage needed?
4. What kind of training will be required?
   1. For administrators
   2. For users
5. If we need to add a phone or remove a phone from the system, how is this done?
6. How will your product increase productivity and provide value?
7. Is tech support available via phone and on-site?
8. What does customer support look like?
   1. Where is it located?
   2. When is it available?
   3. What is turnaround time?
9. What is the licensing structure that you offer?
10. How are calls being catalogued?
11. Does the system meet HL7 standards?
12. How do users retrieve the catalogued calls? What parameters can be specified for retrievals?
13. Does the system provide the ability to create and save custom searches? Please provide a description.
14. Please provide any ad-hoc search capabilities.
15. How are call types defined in the system?
16. Please describe how users identify call types.
17. What types of interfaces are required?
18. How does the system record any activity to the recorded calls (ie listening to the recording, adding comments, etc.)?
19. What information does the system record in connection to the recorded calls?
20. What notifications to supervisory personnel are users able to initiate in regards to a recorded call?

***Technical Requirements***

1. What are the hardware requirements?
2. What are the software requirements?
3. Will the software run on encrypted hard drives (Bitlocker or Securedoc)? Please provide details.
4. Where will the calls/voice data be stored?  If on the NAS, can the software see mapped drives/shares?
5. Is the voice data secure/encrypted? Provide details of how this is done on your system.
6. Is there redundancy built in to your system? If one part of the system is not functional is the whole system down? Please provide a detailed explanation.
7. Disaster recovery capabilities, please describe how this is implemented in your system.
8. How are upgrades handled?
9. What is the frequency of upgrades?
10. What will be required of UTP to do upgrades?
11. What is the solution design? Cloud, virtual, appliances?
12. Is there a physical device that is connected to each phone?
13. What technical support is required from UTP?
14. How does your system do voice and/or video recording?
15. Compatibility with Avaya voice solution
    1. What tie-ins to the system are required?
    2. Compatible with both H.323 and SIP?
    3. Compatible with Avaya v6.2, v6.3, and v7?
16. PCI and HIPAA compliant?
17. Are recorded calls portable? Please explain.
18. Can the system be deployed in a VMWare environment? Please explain how this works in your environment.
19. How will the system(s) interface the call recording solution with our patient records and what protocols will be utilized?

***Implementation***

1. How long to implement your solution?
2. Are Implementation services available?
3. What resources will be required from UTP for system implementation?
4. Please provide an implementation plan.

Optional Features

***Functional Requirements – Workforce Management***

1. How does your solution handle agent scheduling?

2. Does your solution include holiday bidding?

3. Explain real-time adherence feature.

4. How does WFM integrate with call recording?

5. How does WFM integrate with Avaya Call Center Elite?

6. How does it interact with or replace Avaya Call Management System?

7. Explain the products ability to do skills-base routing.

8. What is the WFM vendor’s experience with skills-based scheduling environments?

9. Capabilities to perform ‘what-if’ analyses?

10. How flexible are you with modelling agents, scheduling practices, and skill strategies?

11. Support for email, phone and chat contact types?

12. What does the solution offer beyond traditional forecasting and scheduling tools?

13. Planning utilities to identify what skills are needed, how many resources needed, and when?

14. What expertise, staffing and training are recommended to support solution?

15. Describe logical and hardware designs of the solutions?

16. In what ways is your product set apart from your competitors?

1. **Answers to questions 6, 11, 20, 21 and 35 of ADDENDUM 1 will be deleted and replaced with the following.**

6. What kind of phones do the agents use?

Answer: Avaya 9641G – VoIP phone and Avaya OneX Softphones

11. Please provide a description of the current DR configuration of the Communication Manager/Elite.

Answer: High Availability pair of Avaya Communication Managers and High Availability pair of Session Managers are located at primary data center. By the time the proposed Call Recording solution is in place at our secondary data center, there will be an Avaya High Availability Enterprise Survivable Server pair and High Availability pair of Session Managers in place.

20. Does UTP currently have any High Availability with any of the Avaya systems? If so, what systems are HA?

Answer: Yes, Call Managers, Session Border Controllers, Session Managers existing at primary data center. By the time the proposed Call Recording solution is in place, UTP will the same High Availability replicated at our secondary data center.

21. Does UTP currently have any redundancy with any of the Avaya systems? If so, what systems are redundant?

Answer: Currently, no. By the time the proposed Call Recording solution is in place, we will have redundancy at our secondary data center. Please see #11 and #20.

35. Is UTP comfortable with there being two VMs (virtual servers) at each location to collect calls and funnel them to the cloud?

Answer: The VM environment will be located at our data centers, not at the location for the call center or nurse triage. However, this could be accomplished with our primary and secondary data centers.