

EXHIBIT A – SCOPE OF WORK

I. Performance Measures

A. Goals

From the HSD Strategic Plan

Goal 1: Insure New Mexico

Task 1.1.F. Increase child support enforcement field office outreach to small employers regarding their rights and responsibilities in providing coverage for dependents of employees and how to work within the guidelines governing New Mexico's use of the national medical support notice.

Task 1.2 .A. Increase medical support orders to increase the number of children receiving insurance through non-custodial parents' employer sponsored insurance.

From the Contract Scope of Work

H. 3. Include an employer option at the front of call reception and insure that the customer service center is staffed with a sufficient number of employer specialist representatives so that the longest and average monthly wait time for employer calls does not exceed the standard for all calls.

J. Handle customers' calls with respect to all aspects of the child support program, including, but not limited to, the following types of calls:

11. Medical Support Enforcement and the National Medical Support Notice

From the HSD Strategic Plan

Goal 6: Workforce Development & Infrastructure

Task 6.6.I. Increase percentage of Helpdesk requests completed and resolved with a 90% or greater stratification rating.

Task 6.6.M. Continue to reduce number of constituent complaints about customer service.

From the Contract Scope of Work

A.1. Exercise care, tact, and professionalism in dealing with sensitive topics and angry customers. Child support enforcement deals with emotional issues of money, children, and divorce. Customer Service representatives will be contacted by individuals who react angrily and sometimes aggressively about matters such as not receiving child support, not being allowed to visit their children, having their paychecks reduced involuntarily and tax refunds intercepted for payment of support, losing their drivers' or professional licenses, or perceiving that they have been deprived of their rights, or are "getting the runaround."

B. Objectives

From the Contract Scope of Work

O.1. Handle at least ninety percent (90%) of all questions asked without the necessity of referring the call to the field staff.

C. Activities: See Contract Article 33, Liquidated Damages

II. Scope of Work

The following sections describe the required tasks and subtasks to be performed by the Contractor for each Deliverable under the terms of this Agreement. The Contractor must perform each task and/or subtask, but is not limited to performing only the identified task or sub tasks in a given project area. The Parties hereby agree that the Deliverables are the controlling items and that the Contractor’s obligation is to perform and deliver the Deliverable as described in the following Sections.

A. Deliverable Number 1: Summary Scope of Work

<u>Deliverable One</u>		<u>Due Date</u>	<u>Compensation</u>
Summary Scope of Work		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>The Contractor shall be responsible for establishing and operating the Child Support Customer Service Center (CSC) in Santa Fe, New Mexico with staff, equipment, and management specifically dedicated to handle inquiries from parties to child support cases, attorneys for non-custodial parents, employers, CSED staff, government officials, and the general public. All of the above mentioned persons are referred to as “customers” for purposes of the CSC. Targeted Outbound calls to customers will be included.</p> <ol style="list-style-type: none"> 1. Exercise care, tact, and professionalism in dealing with sensitive topics and angry customers. Child support enforcement deals with emotional issues of money, children, and divorce. Customer Service representatives will be contacted by individuals who react angrily and sometimes aggressively about matters such as not receiving child support, not being allowed to visit their children, having their paychecks reduced involuntarily and tax refunds intercepted for payment of support, losing their drivers’ or professional licenses, or perceiving that they have been deprived of their rights, or are “getting the runaround.” 2. Present itself to all customers as a unit of CSED, not as a private contractor. This does not absolve the Contractor of its responsibility for actions of its employees. 	

B. Deliverable Number 2: Utilize ACUDU

<u>Deliverable Two</u>		<u>Due Date</u>	<u>Compensation</u>
Utilize ACUDU		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	<p>The Contractor will utilize the Department's toll-free lines and the contractor's automated call distribution unit (ACDU).</p> <ol style="list-style-type: none"> 1. This ACDU unit will accept calls transferred from the Division's VRU (Voice Response Unit) as well from outside and inside lines. 2. The ACDU will be able to accept case ID information transmitted from the Division's VRU so that the caller does not have to repeat or re-key this information to the call specialist upon transfer from machine units or call representatives. 3. When the current average wait time exceeds two (2) minutes, advise callers of the estimated wait time. 4. The Contractor will insure that no calls are disconnected by the ACDU prior to a specialist answering. 5. Callers will be able to transfer directly to the Division's VRU either as an option in the queue or by request to a Customer Service Specialist without having to re-key identifying information.
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C. Deliverable Number 3: Transition from the Current CSC

<u>Deliverable Three</u>	<u>Due Date</u>	<u>Compensation</u>
Transition from the Current CSC	7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description

See Description	See Description	<p>The Contractor will assist the Department in transitioning from the current CSC operator to the contractor's CSC. This assistance will include:</p> <ol style="list-style-type: none"> 1. Manage the transition from the current contractor to Contractor CSC, promptly reporting to the Project Manager on status and highlighting issues of transition that require resolution. Technical issues will be communicated directly to the Project Manager. 2. Liaison for the Department among Department technical staff, the Department of Information Technology, and telephone service providers statewide to effect an efficient transition to the Contractor's center. 3. The Contractor is to insure that systems are configured so that calls transferred to and from the CSC from all sources are secure from attempts at illegitimate access or use of the system. 4. The Contractor will insure that a local line is available for intra-Department calls to the CSC and that transfer calls are restricted to CSED offices per the Project Manager and that Contractor line staff are not given local CSED office numbers.
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D. Deliverable Number 4: Monitor VRU

<u>Deliverable Four</u>		<u>Due Date</u>	<u>Compensation</u>
Monitor VRU		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	<p>Monitor the Division's VRU (currently known by the acronym KIDS) on a daily basis to insure 24-hour functionality.</p> <ol style="list-style-type: none"> 1. On each State business day, at a minimum check the VRU once before 8:30 AM (MST) and once between 1:00 and 5:00 PM (MST) to determine whether it is operational and for voice mail messages. 2. Check the VRU once every state non-business day to determine whether it is operational and for voice mail messages. 3. On each State business day and upon customer complaint, spot-check using active case data to determine whether information provided on the VRU is current and consistent with what is displayed online in the CSES. 4. Immediately notify the appropriate technical personnel, as directed by the Project Manager, of any problems in VRU functionality (i.e., hardware, lines, CSES). 5. Respond appropriately to all VRU voice mail left by customers within two (2) hours of the start of the next business day. 6. Account for all VRU voice mail received and responded to in project reporting. 7. Produce weekly and monthly reports on VRU availability and problems in a format which includes information specified by the Project Manager. This report will be submitted to Project Manager.
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E. Deliverable Number 5: Acquire and Furnish Office

<u>Deliverable Five</u>		<u>Due Date</u>	<u>Compensation</u>
Maintain Furnished Office		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Acquire and furnish suitable office space for the CSC at Contractor expense in Santa Fe.</p> <ol style="list-style-type: none"> 1. Include parking space for at least two (2) State staff vehicles. 2. Maintain all personnel, supervision, space, data and phone wiring, furniture, equipment, computers, software, FAX machines, printers, servers, ACDU, related equipment, and supplies needed to operate the customer service center. 	

F. Deliverable Number 6: Submit Equipment List

<u>Deliverable Six</u>		<u>Due Date</u>	<u>Compensation</u>
Submit Equipment List		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Submit to the Project Manager within thirty (30) days of contract execution a detailed list, including serial numbers and license numbers, of all equipment and software acquired or utilized for the CSED CSC. Update this list as equipment is acquired or replaced and submit to the Project Manager.	

G. Deliverable Number 7: Ensure Call Reception

<u>Deliverable Seven</u>		<u>Due Date</u>	<u>Compensation</u>
Ensure Call Reception		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Ensure the office is open and staff are receiving calls during each State business day from 8:00 AM to 5 PM Mountain Time (9 hours), excluding holidays officially recognized by the State or weather emergencies declared by the Governor or approved by the Human Services Department.</p> <ol style="list-style-type: none"> 1. Insure that callers who reach the customer service center before 5:00 PM (MST) are serviced by a live representative if necessary after 5 PM (MST) until all calls in the queue before 5:00 PM (MST) are handled. 2. Include a Spanish option at the front of call reception and insure that the customer service center is staffed with a sufficient number of Spanish speaking representatives and at least one Spanish-speaking supervisor so that the longest and average monthly wait time for Spanish calls does not exceed the standards for all calls. 3. Include an employer option at the front of call reception and insure that the customer service center is staffed with a sufficient number of employer specialist representatives so that the longest and average monthly wait time for employer calls does not exceed the standard for all calls. 	

H. Deliverable Number 8: Train and Manage Staff

<u>Deliverable Eight</u>	<u>Due Date</u>	<u>Compensation</u>
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Train and Manage Staff		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Train and manage staff assigned to the project. <ol style="list-style-type: none"> 1. Develop and update training manuals and training records. 2. Maintain training manuals and records for Department review and approval. Provide print and electronic format copies of all training materials to the Department as they are updated and on contract expiration or termination. 3. Train staff to ensure continued effective operation of the Customer Service unit, including replacement staff and refresher or update training as needed. 4. Coordinate training efforts with CSED trainers as requested. 	

I. Deliverable Number 9: Handle Customer Calls

<u>Deliverable Nine</u>		<u>Due Date</u>	<u>Compensation</u>
Handle Customer Calls		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	<p>Handle customers' calls with respect to all aspects of the child support program, including, but not limited to, the following types of calls:</p> <ol style="list-style-type: none"> 1. Receipt and distribution 2. Disbursement, including direct deposit and debit card issuances 3. Case status 4. Tax refund offset 5. Address updates 6. License suspension 7. Asset lien and seizure 8. Employer data updates 9. Billing 10. Income withholding and turn around documents (T-Docs) 11. Medical Support Enforcement and the National Medical Support Notice 12. New Mexico employee insurance options (Insure New Mexico Program) 13. New Hire Reporting 14. Court Order Modification (Review and Adjustment) 15. General child support questions 16. Credit Card Payments
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J. Deliverable Number 10: Assist Callers with Division's Web Site

<u>Deliverable Ten</u>		<u>Due Date</u>	<u>Compensation</u>
Assist Calls with eCSES		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Assist callers in utilizing the Division's web site (eCSES).</p> <ol style="list-style-type: none"> 1. Callers whose inquiry concerns data readily available on the web site should be advised about the web site after the specialist answers their question. 2. Perform first-level trouble-shooting and resolution for customers who report difficulty navigating the web site. 3. Assist callers with website problems to maximize resolution at customer service of routine user issues without having to refer to the CSES Help Desk. 4. Report to CSES Help Desk any web site issues which indicate a previously unidentified system problem. 	

K. Deliverable Number 11: Respond to Callers Accurately and Timely

<u>Deliverable Eleven</u>		<u>Due Date</u>	<u>Compensation</u>
Respond to Callers Accurately and Timely		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Respond to calls accurately and timely through (including, but not limited to): 1. Researching cases on-line. 2. Referring to caseworkers and follow-up tracking. 3. Communicating with the State Disbursement Unit.	

L. Deliverable Number 12: Communicate with CSED Constituent Services

<u>Deliverable Twelve</u>		<u>Due Date</u>	<u>Compensation</u>
Communicate with CSED Constituent Services		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Communicate with CSED Constituent Services staff to identify, exchange information on, and appropriately resolve Constituent Services inquiries.	

M. Deliverable Number 13: Follow Protocol for Exception Emergency Contacts

<u>Deliverable Thirteen</u>		<u>Due Date</u>	<u>Compensation</u>
Follow Protocol for Exception Emergency Contacts		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	<p>Follow protocol established under the direction of the Project Manager for exception emergency contacts to Customer Service Center requiring immediate attention, to include, but not be limited to:</p> <ol style="list-style-type: none"> 1. Immediate call back requested on License Suspension or Passport Denial actions 2. Media Threats 3. Security Threats 4. Contacts from state officials 5. Urgent Hearing date messages 6. Attorney Contacts 7. Bankruptcy Notifications
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N. Deliverable Number 14: Satisfactorily Resolve Customer Service Inquiries

<u>Deliverable Fourteen</u>	<u>Due Date</u>	<u>Compensation</u>
Satisfactorily Resolve Customer Service Inquiries	7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description

See Description	See Description	<p>Satisfactorily resolve as many Customer Service inquiries as efficiently as possible and refer to field staff only those matters that cannot be resolved by the CSC.</p> <ol style="list-style-type: none"> 1. Handle at least ninety percent (90%) of all questions asked without the necessity of referring the call to the field staff. Not included in the 90% are non-discretionary referrals, defined as license suspension, modification requests, appointment requests, and follow-ups of previous calls where system documentation does not indicate that field staff handled the original referral. 2. Refer delinquent non-custodial parents, such as those wishing to stipulate or pay arrearages, to the CSED field office if necessary after receipt of address and employer information. 3. While Customers may be given the address of the regional office, they are never to be given the regional office telephone number; instead, CSC will inform the appropriate regional staff if a return call directly from the field office appears warranted or is explicitly requested by the caller. 4. Coordinate with field staff so that customers who want to walk in to the local CSED office are directed to the correct office location at the correct time to be received.
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O. Deliverable Number 15: Notify the Department of Complaints

<u>Deliverable Fifteen</u>		<u>Due Date</u>	<u>Compensation</u>
Notify the Department of Complaints		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Notify the Project Manager within one (1) business day after the Contractor has received a complaint against the Contractor's staff. The Contractor shall satisfactorily respond to the complaint within one (1) business day or shall provide the Department a schedule for resolving the complaint. Complaints over issues not under the Contractor's control, such as those against CSED policy, judges' orders, or state law, do not apply.</p>	

P. Deliverable Number 16: Document and Forward Other Complaints

<u>Deliverable Sixteen</u>		<u>Due Date</u>	<u>Compensation</u>
Document and Forward Other Complaints		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Document and forward to the Procuring Agency, Project Manager,, within one (1) business day, any complaints registered with the contractor against other CSED contractors.	

Q. Deliverable Number 17: Document All Calls Received

<u>Deliverable Seventeen</u>		<u>Due Date</u>	<u>Compensation</u>
Document All Calls Received		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Document all calls received using the CSED-prescribed messaging systems and procedures.</p> <ol style="list-style-type: none"> 1. The majority of inquiry referrals to the local Child Support Legal Assistants (CSLAs) by the CSC will be accomplished by using existing CSES screens and functionality. 2. The Contractor will be required to utilize e-mail for specific types of referrals to state staff. 3. Create an explanatory case note on the appropriate CSES screen for each phone call handled for which there is a CSES case. A case note must be created for each CSES-case related call. 	

R. Deliverable Number 18: Handle Misdirected Calls

<u>Deliverable Eighteen</u>		<u>Due Date</u>	<u>Compensation</u>
Handle Misdirected Calls		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	For misdirected calls, provide callers the number of the correct agency before transferring calls if possible. <ol style="list-style-type: none"> 1. If it is not possible to transfer the call, provide the correct telephone number, if available, or advise the caller which agency may likely be able to respond to the inquiry. 2. Track the number of non-CSES case calls received.
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S. Deliverable Number 19: Provide Easy Telephone Access

<u>Deliverable Nineteen</u>		<u>Due Date</u>	<u>Compensation</u>
Provide Easy Telephone Access		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide easy telephone access to the CSC. <ol style="list-style-type: none"> 1. The <u>average monthly wait time</u> during business hours before a caller reaches a live customer service agent must not exceed two (2) minutes. The contractor will insure that all calls reaching the ACDU during work hours are included in the calculation of the average monthly wait time. 2. During business hours, the <u>longest caller wait-time</u> must not exceed ten (10) minutes. 3. Both sub-components, employer option and Spanish option, shall conform to the overall call wait time standards defined above. 	

T. Deliverable Number 20: Evaluate Sufficiency of Lines and Staff

<u>Deliverable Twenty</u>		<u>Due Date</u>	<u>Compensation</u>
Evaluate Sufficiency of Lines and Staff		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Evaluate, per the Project Manager, on the sufficiency of the number of telephone lines installed and the number of persons answering the lines and provide a report to the Project Manager. In order to meet contract call response timeliness requirements, as call volume increases, implement, in coordination with the Project manager: <ol style="list-style-type: none"> 1. Additional lines and/or equipment and, 2. Additional staff. 	

U. Deliverable Number 21: Develop and Maintain Monitoring System

<u>Deliverable Twenty-One</u>		<u>Due Date</u>	<u>Compensation</u>
Develop and Maintain Monitoring System		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Develop and maintain a monitoring system for tracking when a CSED office has been contacted by the CSC for action or information on a customer's call. <ol style="list-style-type: none"> 1. Compile a daily report for distribution to office managers of all referrals that have not been appropriately addressed by field staff after three (3) business days; on a weekly basis, send this overdue report to Regional Operations Managers. 3. Submit weekly reports to the Project Manager showing the response time to referrals for each CSED office at the summary and detail levels. 	

V. Deliverable Number 22: Maintain Confidentiality and Privacy

<u>Deliverable Twenty-Two</u>		<u>Due Date</u>	<u>Compensation</u>
Maintain Confidentiality and Privacy		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	<p>Maintain confidentiality and privacy at all times, in accordance with State and Federal regulations and Department policies.</p> <ol style="list-style-type: none"> 1. Any Contractor employee who breeches confidentiality requirements shall be terminated by the Contractor. 2. <u>Contractor breach of confidentiality with regard to data or information it has access to through the Customer Service Unit may be cause for contract termination.</u> 4. Breeches of confidentiality may result in fines, penalties, and civil or criminal proceedings. 5. The contractor's plan must comply with State Policy on Internet and network access. (http://cio.state.nm.us/itc/rules.html), and HSD 043 General Office Policies.
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W. Deliverable Number 23: Track and Monitor Inquiries' Status

<u>Deliverable Twenty-Three</u>		<u>Due Date</u>	<u>Compensation</u>
Track and Monitor Inquiries' Status		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Track inquiries, and monitor the status of all inquiries to insure timely disposition.	

X. Deliverable Number 24: Maintain Information on Inquiries

<u>Deliverable Twenty-Four</u>		<u>Due Date</u>	<u>Compensation</u>
Maintain Information on Inquiries		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Maintain information on inquiries, including, but not limited to, the following:</p> <ol style="list-style-type: none"> 1. Age of inquiry, 2. Responsible party, 3. Category of inquiry, 4. Geographic location of caller, 5. Status (i.e., in research, closed, etc.), and 6. Indication if call has been referred to another office for resolution. 	

Y. Deliverable Number 25: Provide Weekly Management Reports

<u>Deliverable Twenty-Five</u>		<u>Due Date</u>	<u>Compensation</u>
Provide Weekly Management Reports		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide weekly management reports in a procuring agency approved format , including those generated by the ACDU, that provide, at a minimum, the following: <ol style="list-style-type: none"> 1. Number of calls received, 2. Number of calls abandoned, 3. Number of calls answered by CSC, 4. Number of calls resolved online and percentage completion rate, 5. Average and maximum caller wait times for answered and abandoned calls, 6. Average call talk times, 7. Average call wrap-up (documentation) times, 8. Calls by CSED region, 9. Calls by subject category, 10. Call status by Customer Service Representative, 11. Status by subject type, 12. Aging detail by representative, 13. Detail and summary of messages left on the voice mail, including time and nature of follow-up, 14. Referrals detail, and 15. Outbound calls summary and detail. 	

Z. Deliverable Number 26: Update CSES as Specified

<u>Deliverable Twenty-Six</u>		<u>Due Date</u>	<u>Compensation</u>
Update CSES as Specified		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	Update CSES data as specified in policy and as instructed by CSED. <ol style="list-style-type: none"> 1. Such information may include, but not be limited to, payee and payor address, case contact information, questionnaire and survey information, and employer information related to CSC calls. 2. Coordinate updates as needed with the Employer Maintenance Unit, the State Disbursement Unit, Medical Support Enforcement Unit, the New Mexico New Hires Directory, and the CSED Help Desk.
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AA. Deliverable Number 27: Maintain Voice Mail Options

<u>Deliverable Twenty-Seven</u>		<u>Due Date</u>	<u>Compensation</u>
Maintain Voice Mail Options		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Maintain voice mail options for callers on the ACDU during non-business hours. <ol style="list-style-type: none"> 1. Respond appropriately to all voice mail left by customers during off-hours within two (2) hours of the start of the next business day. 2. Account for all voice mail received and responded to in project reporting. 3. Voice mail must be available for use during work hours on an emergency-only basis with Project Manager approval. 4. Provide callers reaching the after-hours voice mail the option to easily transfer to the VRU rather than leaving a voice-mail. 	

BB. Deliverable Number 28: Generate and Mail Forms

<u>Deliverable Twenty-Eight</u>		<u>Due Date</u>	<u>Compensation</u>
Generate and Mail Forms		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	

See Description	See Description	<p>Generate via CSES or Personal Computer Forms, and, when necessary, mail requested forms to customers.</p> <ol style="list-style-type: none"> 1. The CSC may be required to utilize CSES in order to generate forms, or may be required to mail pre-printed forms, as directed by the Project Manager. The Contractor must request additional CSED forms thirty (30) days in advance of depletion of current stock. 2. Forms may include, but are not limited to: <ol style="list-style-type: none"> 1. Application forms, 2. Direct Deposit forms, 3. Applications for auto withdrawal, 4. Payment Records, 5. Questionnaires and surveys, and 6. Informational brochures. 3. Receive application forms from customers by US mail, identify appropriate field office, mail form to the office, and appropriately document and track activity.
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CC. Deliverable Number 29: Provide Personal Computers for CS Representatives

<u>Deliverable Twenty-Nine</u>		<u>Due Date</u>	<u>Compensation</u>
Provide PCs for CS Representatives		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide one (1) personal computer and appropriate software and access to printer for each Customer Service Representative.	

DD. Deliverable Number 30: Provide Personal Computers for Managers

<u>Deliverable Thirty</u>		<u>Due Date</u>	<u>Compensation</u>
Provide PCs for Managers		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide one (1) PC as above and one laser printer for each CSC manager and supervisor.	

EE. Deliverable Number 31: Provide Network Printer

<u>Deliverable Thirty-One</u>		<u>Due Date</u>	<u>Compensation</u>
Provide Network Printer		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide CSES network printer capability.	

FF. **Deliverable Number 32: Provide Network Connectivity**

<u>Deliverable Thirty-Two</u>		<u>Due Date</u>	<u>Compensation</u>
Provide Network Connectivity		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide New Mexico Department of Information Technology approved connectivity to the state's data center located at 715 Alta Vista, Santa Fe for all PCs provided from the Contractor's site.	

GG. **Deliverable Number 33: Coordinate ACDU Enhancements**

<u>Deliverable Thirty-Three</u>		<u>Due Date</u>	<u>Compensation</u>
Coordinate ACDU Enhancements		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Coordinate all ACDU enhancements with the Project Manager.	

HH. **Deliverable Number 34: Generate ACDU Reports**

<u>Deliverable Thirty-Four</u>		<u>Due Date</u>	<u>Compensation</u>
Generate ACDU Reports		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Utilize the ACDU's reporting capability to generate reports on the average wait time before calls are either abandoned or answered by a live CSC agent during business hours per month.	

II. Deliverable Number 35: Provide Silent Monitoring

<u>Deliverable Thirty-Six</u>		<u>Due Date</u>	<u>Compensation</u>
Provide Silent Monitoring		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Provide the Department and CSC management the ability to silently monitor any CSC call at any time, without prior notice, including calls taken by CSU supervisors. <ol style="list-style-type: none"> 1. Propose and, upon Project Manager approval, implement a methodology for the Department to silently monitor CSU staff both on-site and from the CSED Central Office in Santa Fe. 2. The Department reserves the right to utilize this capability. 	

JJ. Deliverable Number 36: Notify of Staff Vacancies

<u>Deliverable Thirty-Six</u>		<u>Due Date</u>	<u>Compensation</u>
Notify of Staff Vacancies		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Notify the Project Manager of non-Key staff vacancies and rehiring within two (2) business days. (See "Contractor Personnel" in the Terms and Conditions for Key Staff replacements.)	

KK. Deliverable Number 37: Refer Problems to CSES User Help Desk

<u>Deliverable Thirty-Seven</u>		<u>Due Date</u>	<u>Compensation</u>
Refer Problems to Help Desk		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Refer CSES system operation or software problems detected by the Contractor to the CSES User Help Desk.	

LL. Deliverable Number 38: Help Resolve Data Issues

<u>Deliverable Thirty-Eight</u>		<u>Due Date</u>	<u>Compensation</u>
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Help Resolve Data Issues		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	Work with the User Help Desk, Employer Maintenance Unit, and State Disbursement Unit to help resolve data issues which come to the CSC's attention. Such issues as distribution, suspense payments, IV-A/IV-D Interface, and potential System Investigation Requests (SIRS) may require joint research between the CSC and the User Help Desk.	

MM. Deliverable Number 39: Provide Project Management

<u>Deliverable Thirty-Nine</u>		<u>Due Date</u>	<u>Compensation</u>
<u>Provide Project Management</u>		<u>7/01/08-6/30/12</u>	<u>See Exhibit A. III.</u>
Task Item	Sub Tasks	Description	
See Description	See Description	<p>The Contractor must provide project management. Specifically, the Contractor will:</p> <ol style="list-style-type: none"> 1. Provide procedures and controls to manage the project resources. 2. Establish procedures, with Project Manager concurrence, for obtaining State approvals of deliverables, including requested turn-around time for State review, acceptance, or rejection of deliverables. 3. Attend meetings in Santa Fe with Department personnel and provide project status as requested by the Project Manager. 4. Provide support to the Project Manager in coordinating the Monthly Oversight Committee meetings by submitting a proposed agenda in advance to the CSED Program Manager, setting up the calls and notifying participants, reporting project statistics, identifying issues requiring resolution, and taking and distributing meeting minutes. 5. Conduct targeted customer live outbound calls to assist the agency in meeting its performance goals. 6. Conduct customer service satisfaction survey once every six (6) months. 	

NN. Deliverable Number 40: Submit Project Plans and Recommendations

<u>Deliverable Forty</u>		<u>Due Date</u>	<u>Compensation</u>
Submit Project Plans and Recommendations		8/01/08	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Submit draft project plans and recommendations to the Project Manager within thirty (30) days of contract execution. Submit final plans within fifteen (15) days of receiving written comments on the draft plan from the Project Manager. Project plans include:</p> <ol style="list-style-type: none"> 1. Plan for proactive child support activities (Outbound Calls), including semi-annual customer service surveys, to assist the agency in meeting its performance goals. 2. Quality Assurance & Semi-Annual Customer Satisfaction Survey Plan. 3. Security and Confidentiality Plan. 4. Disaster Recovery Plan. 5. Turnover Plan for turning over property, equipment, and services to the Department or subsequent contractor upon Contract expiration or termination. The Project Turnover Plan will: <ol style="list-style-type: none"> a. Detail how the vendor will turn over the IT assets including PC, Server, Firewall, and Switch hardware to the state at the conclusion or termination of the contract. b. Detail how the software licenses will be turned over. c. Include a software and hardware inventory that includes the date of purchase, vendor purchased from, warrantee duration, description of item, and number of items. d. Include the vendor delivering the equipment and software to the HSD Warehouse location to complete the turn over. 	

OO. Deliverable Number 41: Provide Call Handling Analysis

<u>Deliverable Forty-One</u>		<u>Due Date</u>	<u>Compensation</u>
Provide Call Handling Analysis		10/01/08	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>Provide analysis of call handling and reporting to include the KIDS Line VRU and provide comprehensive solution recommendations for streamlining and improving quality of call handling services.</p>	

PP. Deliverable Number 42: Conduct and Document Outbound Calls

<u>Deliverable Forty-Two</u>		<u>Due Date</u>	<u>Compensation</u>
Conduct and Document Outbound Calls		7/01/08-6/30/12	See Exhibit A. III.
Task Item	Sub Tasks	Description	
See Description	See Description	<p>In accordance with the approved Proactive Child Support Activities plan, conduct and document live outbound calls to customers in order to enhance CSED productivity. Such outbound calls may include, but not be limited to:</p> <ol style="list-style-type: none"> 1. Court hearing and other appointment reminders 2. Payment reminders and promotion of use of EFT for both payment and receipting 3. National Medical Support Notice follow-ups to employers 4. Follow-up on previously requested information (financial, paternity, etc.) 5. Address and employer verifications 6. New Income withholding follow-ups 	

QQ. Deliverable Number 43: Furnish Technical Resources

<u>Deliverable Forty-Three</u>		<u>Due Date</u>	<u>Compensation</u>
Furnish Technical Resources		7/01/08	See Exhibit A. III. Exhibit A. III.G. = \$172,000 Exhibit A. III.H. = \$15,000 Exhibit A. III.I. = \$122,500 Exhibit A. III.J. = \$48,000 Total: \$357,500
Task Item	Sub Tasks	Description	

See Description	See Description	
		<p>Equip Contractor's Customer Service Center with all technical resources to effectively support all Scope of Work Items in compliance with Department technical specifications, including:</p> <ol style="list-style-type: none"> <li data-bbox="592 384 1284 420">1. Telephone System - Exhibit A. III.G. = \$172,000 <li data-bbox="592 493 1317 529">2. Network Connectivity - Exhibit A. III.H. = \$15,000 <li data-bbox="592 602 1159 638">3. Hardware - Exhibit A. III.I. = \$122,500 <li data-bbox="592 711 1138 747">4. Software - Exhibit A. III.J. = \$48,000

III. Compensation Schedule

The fully-loaded fixed call inbound and outbound base rate costs include all travel, per diem, fringe benefits, performance bond, and any overhead costs for contractor personnel, as well as subcontractor personnel, if appropriate, for deliverables for 1-39 & 42. The fully-loaded fixed base rate costs will be adjusted annually based on the Department's Estimated Consumer Price Index Adjustment of 2.9% increase per year.

CUSTOMER SERVICE CENTER CALLS

ITEM	DESCRIPTION	BASE RATE~	ESTIMATED ANNUAL CALL VOLUME	ESTIMATED BASE RATE COST
Deliverables 1-39	Customer Inbound Calls Handled by Customer Service Center Specialist^	\$3.89	470,000	\$1,828,300.00
Deliverable 42	Authorized Outbound Call from Customer Service Center	\$3.93	120,000	\$471,600.00
	Total	\$7.82	590,000	\$2,299,900.00

~ The Base Rate for Live Outbound Calls includes costs of semi-annual customer satisfaction surveys.

^ Abandoned calls are not chargeable.

FIXED DELIVERABLES

These items are identified according to the specific deliverables

Item	Deliverable	Description	Fixed One-Time Cost
III.A.	40.1	Proactive Child Support Activities Plan	\$0.00
III.B.	41	Analysis and Recommendation for Comprehensive Call Handling and Reporting Services	\$0.00
III.C.	40.2	Quality Assurance & Customer Satisfaction Survey Plan	\$0.00
III.D.	40.3	Security and Confidentiality Plan	\$0.00
III.E.	40.4	Disaster Recovery Plan	\$0.00
III.F.	40.5	Turnover Plan	\$0.00
III.G.	43.1	Telephone System	\$172,000
III.H.	43.2	Network Connectivity	\$15,000
III.I.	43.3	Hardware	\$122,500
III.J.	43.4	Software	\$48,000
	Total	All Deliverables	\$357,500

CSED CUSTOMER SERVICE CENTER COST PROPOSAL CALCULATION WORKSHEET

Description	Base Rate [◇]	Estimated CPI [●] Adjust-ment Factor	CPI Adjusted Rate [*]	Estimated Annual Volume	Total [□]	Total with Gross Receipts Tax [▪]
Year One Inbound Calls	\$3.89	1.0	\$3.89	470,000	\$1,828,300.00	\$1,972,278.63
Year One Outbound Calls	\$3.93	1.0	\$3.93	120,000	\$471,600.00	\$508,738.50
Year One Fixed Cost Deliverables [^]	\$357,500.00	1.0	\$357,500.00	1.0	\$357,500.00	\$385,653.13
Year One Subtotal					\$2,657,400.00	\$2,866,670.26
Year Two Inbound Calls	\$3.89	1.029	\$4.00	470,000	\$1,880,000.00	\$2,028,050.00
Year Two Outbound Calls	\$3.93	1.029	\$4.04	120,000	\$484,800.00	\$522,978.00
Year Two Subtotal					\$2,364,800.00	\$2,551,028.00
Year Three Inbound Calls	\$3.89	1.058	\$4.11	470,000	\$1,931,700.00	\$2,083,821.38
Year Three Outbound Calls	\$3.93	1.058	\$4.15	120,000	\$498,000.00	\$537,217.50
Year Three Subtotal					\$2,429,700.00	\$2,621,038.88
Year Four Inbound Calls	\$3.89	1.087	\$4.23	470,000	\$1,988,100.00	\$2,144,662.88
Year Four Outbound Calls	\$3.93	1.087	\$4.27	120,000	\$512,400.00	\$552,751.50
Year Four Subtotal					\$2,500,500.00	\$2,697,414.38
Grand Total					\$9,952,400.00	\$10,736,151.52

◇ Base Rate for Years One through Four equals the Cost Per Inbound Call from the Cost Response Form. Must remain the same for each year.

^ Insert Total All Deliverables from Cost Response Form in the Base Rate for this item.

● Estimated Consumer Price Index Adjustment Factor, equals 2.9% increase per year.

* Multiply Base Rate times Estimated CPI Adjustment Factor.

□ Multiply CPI Adjusted Rate times Estimated Annual Volume.

▪ Actual costs will include gross receipts tax, itemized separately on invoices, to be added by the Agency to the offeror's total cost.

▪ Total times 7.875 percent, Current Santa Fe County Gross Receipts Tax.

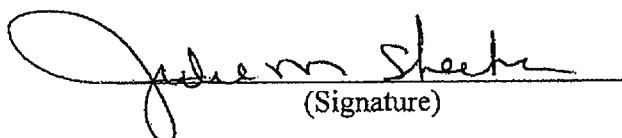
EXHIBIT B

CUSTOMER SERVICE CENTER

TERMS AND CONDITIONS STATEMENT OF CONFIDENTIALITY

The undersigned employee of Health Management Systems, hereinafter referred to as "Contractor", agrees, during the term of the Contract between Contractor and the New Mexico Human Services Department (HSD) and forever thereafter, to keep confidential all information and material provided by HSD or otherwise acquired by the employee, excepting only such information as is already known to the public, and including any such information and material relating to any customer, client, vendor, or other party transacting business with HSD, and not to release, use or disclose the same except with the prior written permission of HSD. This obligation shall survive the termination or cancellation of the Contract between Contractor and HSD or of the undersigned's employment or affiliation with Contractor, even if occasioned by Contractor's breach or wrongful termination.

The undersigned recognizes that the disclosure of information may give rise to irreparable injury to HSD, a client or customer of HSD, or to the owner of such information, inadequately compensable in damages and that, accordingly, HSD or such other party may seek and obtain injunctive relief against the breach or threatened breach of the within undertakings, in addition to any other legal remedies which may be available. The undersigned acknowledges that he or she may be personally subject to civil and/or criminal proceedings for such breach or threatened breach.


(Signature)

HMS
Program Manager
(Title)

7-1-2008
(Date)