

Attachment B. Title Page, Vendor Information, Executive Summary, Subcontractor letters and table of Contents

This section provide instructions to vendors on what to include for the title page, vendor information executive summary, subcontractor letters and table of contents

**Contact Center Request for Proposals**

**2022-PRMP-MES-Contact Center-004**

**May 11, 2022**

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Technical Proposal – Attachment B

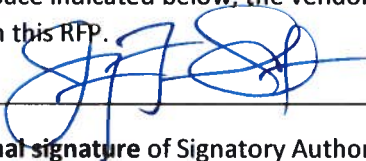
**Attachment B: Title Page**

**B.1 Title Page / Submission Cover Sheet:**

Person responsible for completing the vendor response:

- **Name:** Joaquín Fernández Quintero
- **Phone:** 787-999-6200
- **Address:** PMB 347  
Ave. Winston Churchill #138  
San Juan, PR 00926-6013
- **Fax:** (787)625-8780
- **Email:** fernandez@telemedik.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.

 / 5/11/22

**Original signature of Signatory Authorized to Legally Bind the Company / Date**

- **Name:** Joaquín Fernández Quintero
- **Title:** Principal, President and Founder
- **Company Name2:** JAYE, Inc. DBA TeleMedik
- **Physical Address:** PMB 347  
Ave. Winston Churchill #138  
San Juan, PR 00926-6013
- **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.

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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.

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**B.2 Vendor Information**

- Primary point of contact for any questions pertaining to the vendor’s payment address
- Address to which PRMP should send legal notices for any potential future agreements

• **Table #1: Payment Information**

Payment Information			
Name:	Joaquin Fernandez Quintero	Title:	President & Founder
Address:	PMB 347 Ave. Winston Churchill #138		
City, State, and Zip Code:	San Juan, PR 00926-6013		
Phone:	787-474-7670	Fax:	(787)625-8780
Email:	<a href="mailto:fernandez@telemedik.com">fernandez@telemedik.com</a>		

**Table #2: Legal Notice Information**

Legal Notice Information			
Name:	Joaquín Fernandez Quintero	Title:	President & Founder
Address:	PMB 347 Ave. Winston Churchill #138		
City, State, and Zip Code:	San Juan, PR 00926-6013		
Phone:	787-474-7670	Fax:	(787)625-8780
Email:	<a href="mailto:fernandez@telemedik.com">fernandez@telemedik.com</a>		

### B.3 Executive Summary

TeleMedik is the only Contact Center specialized in healthcare in Puerto Rico, a leading provider of Contact Center and Clinical collaboration solutions designed to extend healthcare services, reduce costs, and improve outcomes. We introduced the telehealth concept at our market and gained over 25 years of experience in the delivery of URAC accredited services to diverse patients and Medicaid/Medicare's enrollees. We also deliver customized health programs and solutions tailored to its clients' needs such as Emergency Room visits preauthorization, Disease Management, Pharmacy Services, among others. For the last 20 years we provided Contact Center Services and support channels for managing multiple needs including response to inquiries from members and providers, services coordination, outbound and outreach strategies for meeting compliance requirements, enrollment, and retention activities with consistent and outstanding results.

The company embraces innovation, cultural competency and responds effectively to the cultural needs of its members in Puerto Rico and the Hispanic markets that it serves. TeleMedik owns and operates a robust Contact Center infrastructure with two "state of the art" facilities, strategically located in Guaynabo and Mayaguez. We were the only contact center that maintained continuity of services 24x7 without interruptions during the last Hurricanes in 2017 (Irma and Maria), the earthquakes and during COVID-19 pandemic situation. Over 95% of our headcount moved within a two-week period to a hybrid working model ensuring compliance and safety to our population.

TeleMedik recognizes the challenges and needs of our clients and is sensible to the different and unique approaches to promotes engagement and loyalty within this industry and environment. Our experience and professional resources are ready to support your strategies to reach your most valuable customers. Our infrastructure, capabilities, and uninterrupted availability (24x7) to fit your needs; are only some of the added values of our partnership. We want to support your goals; with a customize model that fits and combines your needs. According to your target and goals, we will support in developing a unique outreach approach to serve your needs.

As part of Telemedik' s ongoing commitment to innovation and enhancement of the end user experience with different health delivery models and programs, the organization has entered a partnership with AWS (Amazon Web Services), and we transitioned to TeleMedik Cloud Global Solution. This technology helps us to provide superior customer service and gives our clients personal, dynamic, and natural experiences. We are proud to support our customers and partners around the world in the development of the new generation of integrated health.

#### A. Mission, Vision & Corporate Values

The Company has evolved over the last 25 years as well as our mission and corporate strategies are continuously challenged by the environment and the health care opportunities that emerge from this industry. The **Mission** is aimed to "Increase Health Services efficiency and efficacy through innovative health care solutions that integrate clinical, technological and regulatory expertise and competencies; while contributing to the development of a sustainable, sensible and accessible Health System."

The Company **Values** seek to demonstrate in every action our company philosophy, the leadership and management commitment and employees expected actions and behaviors. The Organizational Values are

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the following: **Passion for Excellence, Integrity, Social Responsibility, Teamwork, Flexibility and Diversity.**

**B. Our Organizational Structure and Chart**

Our services are provided and supported by our affiliates which guarantee **cultural sensitivity** and immediate response to specific needs with dedicated key account specialists for fast understanding and delivery.

The TeleMedik Group is led by a formal governance to ensure and monitor compliance and efficiency indicators. Our Structure seeks to maintain a simple, open, and flexible environment capable to maintain outstanding levels of communication for fast paced actions, involvement, and efficiency, while maintaining strict compliance and commitment. Following we share a general overview of our Corporate and Governance Structures. The Organizational Structure is organized as follows:

**Affiliates**

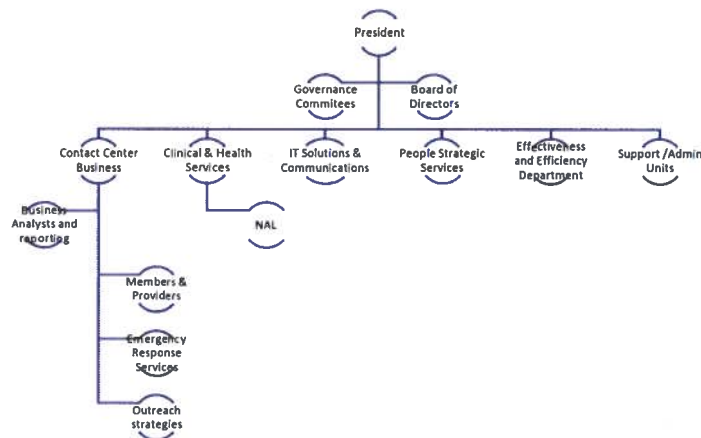
TeleMedik Group



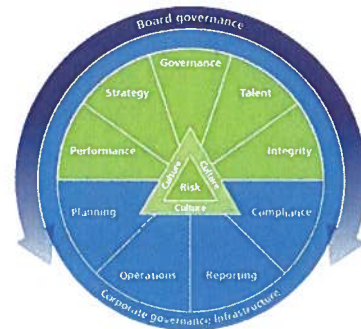
Ilustración 1. Telemedik Group

**Corporate Governance composition:**

- Board of Directors
- Advisory Board
- Corporate Compliance Committee
- Corporate Quality Program Committees



Ilustration 3. Organizational Functional Structure



Ilustration 2. Corporate Governance

C. The Contact Center Services Division

The Contact Center structure and technologies focus on providing innovation, agility, and simplicity to our core processes. Innovation through business solutions to respond to our clients challenging needs, agility to meet service and regulatory requirements in a fast but effective implementation cycle and simplicity for the people; to ensure a unique service experience.

The CC team's composition supports the Patient/Enrollee Experience and facilitates our client objectives considering the specific needs of each population. The Quality and Compliance team makes sure that the requirements are satisfied, and the corrective/continuous improvement actions taken. The Contact Center Structure is defined to serve 24x7, considering the business realities and the most recent challenges in the workforce environment.

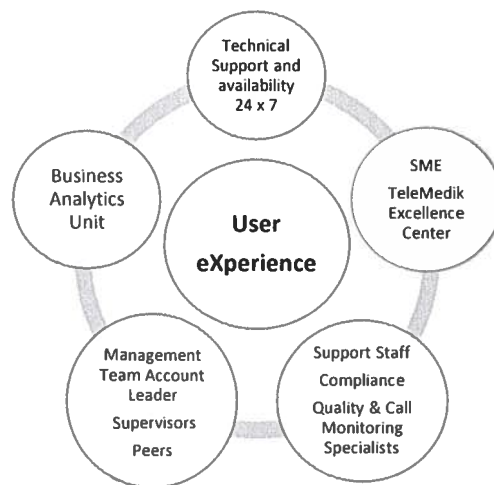


Illustration 4. Account Teams Composition

TeleMedik, acts as a delegated entity for our clients meeting the highest service and quality standards required by the principal regulatory agencies. We understand and define protocols to ensure that CMS (Center for Medicare and Medicaid Services); ASES, NCQA, URAC, and our client expectations are met. Annually we are subject to over 20 external and internal audits that validate our commitment to excellence. We ensure that every employee has been trained and understands the HIPAA privacy and security policies and procedures implemented by the organization. The Corporate Compliance and Privacy/Security Programs include the SOC II audit to validate and guide our efforts to continuously improve and reduce risk challenges. Technical audits and surveillance processes are in place to protect our communication ports and data management controls (vulnerability and penetration test, constant monitoring, etc.). Also, effective backup and archiving policies and procedures for protected health information and digital assets of the organization are in place to comply with our clients' requirement (10 years).

TeleMedik understand and is culturally sensitive to the unique needs and standards of the Medicaid and Medicare populations. Our responsiveness, flexibility and capabilities to respond with a cost effective, safe and flexible approach is a basic standard to demonstrate the reliability required by clients.

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**B.4 Subcontractor Letter (Not Applicable):**

The service Telemedik provides to clients is directly managed by TeleMedik employees without the use of subcontractors.



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**B.5 Table of Content**

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**B.7 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.

JAYE, Inc db/a TeleMedik

(Company)

787 474-7470

(Contact Phone/Fax Number)

Joaquín Fernandez President

(Representative Name, Title)

05-11-2022

(Date)

Attachment C. Vendor Qualifications and Experience

This section will provide instructions to vendors to complete information required for the organizational overview, corporate background, experience in the public sector, and certifications.

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**Attachment C: Vendor Qualifications and Experience**

**C.1 Organization Overview**

**Table #3: Vendor Overview**

Vendor Overview	
Company Name	JAYE, INC. d/b/a TeleMedik
Name of Parent Company (If Applicable)	N/A
Industry (North American Industry Classification System [NAICS])	561422 (Customer Service Call Center) 621999 (All Other Miscellaneous Ambulatory Health Care Services)
Type of Legal Entity	Corporation
Company Ownership (e.g., Private/Public, Joint Venture)	Private
Number of Full-Time Employees	400
Last Fiscal Year Company Revenue	\$15,059,052
Last Fiscal Year Company Net Income	\$1,629,850
Percentage of Revenue from State and Local Government Clients in the United States and its territories	11%
Number of Years in Business	26
Number of Years Vendor has been Providing the Type of Services Specified in the RFP	TeleMedik has offered Contact Center Services related to Health Education since 1996, and specifically for Medicaid Members and Providers since 2009
Number of Employees Providing the Type of Services Specified in the RFP	150
Headquarters in the United States	Puerto Rico
Locations in the United States	Puerto Rico

**C.2 Mandatory Qualifications**

This section details the 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.

**Table 04: Mandatory Qualifications**

Mandatory Qualification Item(s)	Vendor Meets?	Provide A Brief Narrative to Demonstrate Fulfillment of Requirement
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.	<b>YES</b>	TeleMedik has over 25 years of experience managing the requirements and the logistics related to Contact Services, specifically dedicated and created to manage the complexity of the Health Industry requirements. Accredited since 2001 by an accredited reviewer - URAC, provided Telemedik with the foundation to meet Government and Commercial Sectors. TeleMedik has been selected since 2009 by the different MCO/HMOs to manage the different Government Health Programs ( <i>Reforma, Mi Salud, Salud Vital</i> ) with consistent results and direct exposure to CMS regulator.
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).	<b>YES</b>	TeleMedik has proven experience and deliverables to meet Medicaid, Medicare and other related agencies. Our Compliance and Quality Governance is defined to ensure continuous monitoring of the policies and procedures in place as well as to serve as experts for our customers during first time implementation of this services for some of them. Since 2002, Telemedik provided Nurse Advice Health Call Center to La Cruz Azul de PR under la <i>Reforma de Salud</i> . On 2010 TeleMedik supported MCS and HUMANA management of their Contact Centers for <i>Mi Salud</i> . On the transition to Triple-S of all the Government Health Plan Regions (2011); we absorbed in an extremely limited scope of time the total operations for this vendor. Later in 2015, TeleMedik, expanded its operations to the West Region enhancing its operations, adding its capacity to manage and ensure business continuity for over 500 employees, and providing services to all the Medicaid MCOs: First Medical, MMM Multi Health, Molina Healthcare and Triple-S. Later in the 2018 transition to Plan Vital, we also provided services to Plan de Salud Menonita. During last years, we have actively participated in the readiness assessments and in direct Interviews with the regulators hand to hand with our clients during auditing and assessment processes (Medicaid, Medicare, Life Link, URAC, Puerto Rico Health Insurance Administration (PRHIA), Puerto Rico Department of Health, Puerto Rico Department of Family Affairs, etc.

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<p>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.</p>	<p><b>YES</b></p>	<p>As part of the response to this segment we included the detailed references and SOW as required on Section 5. References.</p> <p>The references included the following:</p> <ol style="list-style-type: none"> <li>1. <b>Triple-S-</b> Contact Center for Members and Providers (Medicaid Members)</li> <li>2. <b>MMM Multi Health-</b> Contact Center Services, Pharmacy Call Center and Nurse Advice Line for Medicaid Members</li> <li>3. <b>MSO of Puerto Rico-</b> Nurse Advice Line, Smoking Cessation Program, Disease Management, Discharge Planning Unit and Health Risk Assessment for Medicaid Members</li> </ol>
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**C.3 Existing Business Relationships with Puerto Rico**

TeleMedik has direct business relationship with the principal HMO's of the Government Health Plan since 2010, as a delegated entity to provide the Contact Center Services and to manage inquiries from their providers and members that benefit from the Medicaid Programs. During the last 12 years we have offered services for Triple-S, MMM Multi Health, Molina Healthcare, Plan de Salud Menonita, First Medical, Humana and MCS. Some of them are also TeleMedik clients for Medicare related services. Other business relationships with Puerto Rico Government and Municipalities have been established to manage direct services related to; Smoking Cessation Quit Line (Federal Requirement), COVID -19 Contact Tracing Emergency Line and Service to municipalities (2020), For the last three years we have been managing the Emergency Line for Care Referrals of the Government Family Affairs Department.

**C.4 Business Disputes**

Telemedik has served directly or as a Delegated Entity for many of our clients and has never been involved in any business dispute neither directly nor indirectly.

**C.5 References**

**Table #5: Vendor References**

TeleMedik offers multiples services to many of its clients, for the objective of this proposal the references shared demonstrate the ability to handle the populations and type of transactions and systems used to meet the RFP type of inquiries. The three references show the continuity of services and increment of tasks added during long time periods. The expertise to support the client needs and the staff competencies to serve the main objectives. Services are provided in normal, afterhours and holidays providing the flexibility required according to the populations and regulatory requirements. Different delivery models have been adapted according to the client specific terms.

**Reference 1: Triple S**

Vendor Information		
<b>Vendor Name:</b> JAYE d/b/a TeleMedik	<b>Contact Name:</b>	Joaquín Fernández Quintero
	<b>Contact Phone:</b>	787-999-6200
Customer Information:		
<b>Customer Organization:</b> Triple-S Salud	<b>Contact Name:</b>	Nannette Dumont
	<b>Contact Title:</b>	Service Management
<b>Customer Address:</b> 1441 Avenida Roosevelt PO Box 36328 San Juan, PR 00936-3628	<b>Contact Phone:</b>	787-749-4949
	<b>Contact E-mail:</b>	ndumont@ssspr.com
<b>Total Vendor Staff:</b> 106 Customer Service Representatives (Direct Service) + Management and Support Staff		
<b>Objectives:</b> Customer Service Contact Center to provide orientation and resolution to inquiries from the members and providers of Plan Vital (GHP), while complying with key performance standards and guarantees.		
<b>Description:</b> Contact Center Services from 7am to 7pm to serve Monday to Sunday Services (365) and holidays. CC Representatives are trained on client platforms (14 apps), regulatory requirements, policies and procedures and GHP services to ensure meeting quality and Medicaid requirements. 100% calls are recorded and monitored for continuous improvements. Claims are managed and referred according to regulatory requirements. DRP and BCP are part of the key requirements to ensure business continuity and support. Performance Standards (< 5%, SL 85%, Over 90% in Quality of Services and documentation requirements are continually audited and monitored by the Delegation Oversight Unit.		
Vendor Information		
<b>Vendor's Involvement:</b> In 2011 Triple S re-initiated its contract with the GHP and on 2012 was delegated to manage the total of its 8 regions in a very short time. We engage and support its implementation transitioning to ensure a go live in compliance with CMS/ ASES requirements and readiness assessments. We supported the project management process; conducting readiness assessments and participating actively in the development of policies and procedures to meet regulator expectations. From technical meetings for lines transferring, VPN's, DID, skills and scripts definition maps; to operational assessments; process flows, personnel hiring and support during the regulator meetings were held. Call volumes assessments and negotiation with vendors (AT&T, AVAYA. INTERNET) where expected to ensure fast response to increase telephony capabilities according to traffic trends. TeleMedik demonstrated and was recognized for fast and reliable project management (24 x 7) and for its capacity to manage high peak volumes with high capable staff and strong physical and technological infrastructure. Going forward, the GHP model was changed, and different players took part, and regions were redistributed among different GHP. As of today, Triple S keeps over 450,000 members of Plan Vital and we continue to provide Contact Center services for members and providers.		
Key Personnel		
<b>Name:</b> Wanda López, Contact Center Director	<b>Role:</b> Contact Center Operations and Services Director Operations Flowcharts, Scripts, Volumes Forecast, etc.	

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<b>Name: Sonia Montes, Human Resources Director</b>	<b>Role:</b> People Strategic Services Division (Staffing, Training)
<b>Name: Edgar Ramírez, Quality and Compliance Manager</b>	<b>Role:</b> Organizational Effectiveness Department (Integration, risk and readiness assessments)/ Compliance, quality and compulsory requirements
<b>Name: José Figueroa, Information System Director</b>	<b>Role:</b> IT Solutions Director Systems capabilities, connectivity, reliability for continuity, technical call center support, access controls and service agreements between client and TeleMedik.
<b>Measurements:</b>	
<b>Estimated Costs:</b> \$1,396,248.77	<b>Actual Costs:</b> \$3,574,091.34
<b>Reason for change in cost:</b> Changes in scope of work and membership to serve.	
<b>Original Value of Vendor's Contract:</b> \$1,534,339.30	
<b>Actual Total Contract Value:</b> \$3,884,881.89	
<b>Reason(s) for change in value:</b> Increase in client's memberships, service volume, scope of work and rates adjustments.	
<b>Estimated Start &amp; Completion Dates:</b>	<b>From: 01/2014</b> <b>To: continue</b>
<b>Actual Start &amp; Completion Dates:</b>	<b>From: 01/2014</b> <b>To: Present</b>
<b>Reason(s) for the difference between Estimated and Actual dates:</b> Contracts were defined for one, or two years. Afterwards service agreements are defined with amendments for one-year automatic renewals.	
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: TeleMedik does no use subcontractors to supply the service to Triple SSS beneficiaries.	

**Reference 2: MMM/MMM Multi Health**

<b>Vendor Information</b>		
<b>Vendor Name:</b> JAYE d/b/a TeleMedik	<b>Contact Name:</b>	Joaquín Fernández Quintero
	<b>Contact Phone:</b>	787-999-6200
<b>Customer Information:</b>		
<b>Customer Organization:</b> MMM Multi Health	<b>Contact Name:</b>	Orlando González
	<b>Contact Title:</b>	President
<b>Customer Address:</b> 350 Avenida Chardon Suite 500 Torre Chardon San Juan, PR 00918	<b>Contact Phone:</b>	787-622-3000
	<b>Contact E-mail:</b>	orlando.gonzalez@mmmhc.com
<b>Total Vendor Staff:</b> 25 Customer Service Representatives (Direct Service) + Management and Support Staff		
<b>Objectives:</b> Health Contact Center and Emergency Response Center to provide symptoms evaluations and Emergency Contact Center Services to assess and recommend the best level of care according to customer description of situation. High performance management and efficiency is needed to reduce unnecessary costs of going to an ER Department and proactive activities to reduce live threatening events.		
<b>Description:</b> NAL- Nurse Advice 365x7x24 Service lines (URAC Certified since 2001), offered by experienced registered nurses, with KPI and service guarantees. Pharmacy Call Center for GHP (Providers) Members Service Contact Center for GHP		



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MMM Alerta- Emergency response service to provide immediate response to MMM MA Affiliates. ISO22320 Certification proves the standards and service minimum requirements to maintain the certification.	
<b>Vendor Information</b>	
<b>Vendor's Involvement:</b> Provide a complete Contact Center solution with evidence-based protocols to meet client expectations. Provide owned apps to supply the services and continuously monitor compliance and quality providing constant communication to the client's oversight. Establish Emergency protocols and operational policies. In both services Medicare and Medicaid populations are served 24 x 7, following protocols and under continuous compliance of policies and procedures.	
<b>Key Personnel</b>	
<b>Name: Wanda López, Contact Center Director</b>	<b>Role:</b> Contact Center Operations and Services Director Operations Flowcharts, Scripts, Volumes Forecast, etc.
<b>Name: Sonia Montes, Human Resources Director</b>	<b>Role:</b> People Strategic Services Division (Staffing, Training, Retention)
<b>Name: Edgar Ramírez, Quality and Compliance Manager</b>	<b>Role:</b> Organizational Effectiveness Department (Integration, risk and readiness assessments)/ Compliance, quality and compulsory requirements
<b>Name: José Figueroa, Information System Director</b>	<b>Role:</b> IT Solutions Director Systems capabilities, connectivity, reliability for continuity, technical call center support, access controls and service agreements between client and TeleMedik.
<b>Measurements:</b>	
<b>Estimated Costs:</b> \$2,365,011.14	<b>Actual Costs:</b> \$2,205,264.68
<b>Reason for change in cost:</b> Changes in scope of work and membership to serve.	
<b>Original Value of Vendor's Contract:</b> \$2,570,664.28	
<b>Actual Total Contract Value:</b> \$2,371,252.34	
<b>Reason(s) for change in value:</b> Increase in client's memberships, service volume, scope of work and rates adjustments.	
<b>Estimated Start &amp; Completion Dates:</b>	<b>From: Abril 2015</b> <b>To: Present</b>
<b>Actual Start &amp; Completion Dates:</b>	<b>From: Abril 2015</b> <b>To: Present</b>
<b>Reason(s) for the difference between Estimated and Actual dates:</b> Contracts were defined for one, or two years. Afterwards service agreements are defined with amendments for one-year automatic renewals.	
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: Services under this contract are directly managed by Telemedik employees.	

**Reference 3: MSO of Puerto Rico**

<b>Vendor Information</b>		
<b>Vendor Name:</b> JAYE, d/b/a TeleMedik	<b>Contact Name:</b>	Joaquín Fernandez Quintero
	<b>Contact Phone:</b>	787-999-6200
<b>Customer Information:</b>		
<b>Customer Organization:</b> MSO of Puerto Rico	<b>Contact Name:</b>	Gonzalo Salinas
	<b>Contact Title:</b>	Vice president
<b>Customer Address:</b> 350 Avenida Chardon Suite 500 Torre Chardon San Juan, PR 00918	<b>Contact Phone:</b>	787-622-3000
	<b>Contact E-mail:</b>	gonzalo.salinas@mso-pr.com
<b>Total Vendor Staff:</b> 22 (Nurses, Nutritionist, Social Workers, Contact Center Representatives)		

Puerto Rico Medicaid Program Contact Center Request for Proposals  
 Technical Proposal – Attachment C

<p><b>Objectives:</b> Contact Center Services to provide orientation and resolution to different services offered to Medicare enrollees and providers under a Medicare Advantage (MA) Plan following CMS requirement. Include inbound and outbound calls as well as use of other outreach strategies to increase contact ratios.</p>	
<p><b>Description:</b> Different Services are provided within a period of 7am to 7pm to serve Monday to Sunday Services (365) and holidays. Health Care professionals (Nurses, Nutritionists, Social Workers, Pharmacy Technicians and CC Representatives are trained on client platforms (ex. Medhok), regulatory requirements, policies and procedures and MOC program scope to ensure meeting quality and Medicare requirements. 100% calls are recorded and monitored for continuous improvements. The services are under time sensitive time frames and continuously audited to ensure accuracy and call resolution time frames. The services under this client include:</p> <ul style="list-style-type: none"> <li>• Coordination for transportation services</li> <li>• Smoking Cessation Program</li> <li>• Waiting for information for approvals</li> <li>• Health Risk Assessments and Data Validation Audits</li> <li>• Disease Management Program</li> <li>• Discharge Planning Unit Services (DPU)</li> </ul> <p>Inquiries are managed and referred according to regulatory requirements. DRP and BCP are part of the key requirements to ensure business continuity and support. The performance standards include: &lt; 3 to 5% abandonment, SL 85%, and applicable contact ratios, among others. Over 90% in Quality of Services and documentation requirements are continually audited and checked by the Delegation Oversight Unit in a monthly basis.</p>	
Vendor Information	
<p><b>Vendor's Involvement:</b> Manages the referred cases, confirm information, document, follow up accordingly to the service, document at the client platform every transaction or manages data and conduct DVA in a monthly or annual basis as applicable.</p>	
Key Personnel	
<p><b>Name:</b> Eliber Baéz, Medical Director</p>	<p><b>Role:</b> Define polices according to best clinical guidelines and protocols to meet client expectations. Continuous education and training to support and clinical staff is annually reinforced</p>
<p><b>Name:</b> Wanda López, Contact Center Director</p>	<p><b>Role:</b> Contact Center Operations and Services Director Operations Flowcharts, Scripts, Volumes Forecast, Retention.</p>
<p><b>Name:</b> Sonia Montes, Human Resources Director</p>	<p><b>Role:</b> People Strategic Services Division (Hiring, Staffing, Training. Cultural Sensitivity)</p>
<p><b>Name:</b> Edgar Ramírez, Quality and Compliance Manager</p>	<p><b>Role:</b> Organizational Effectiveness Department (Integration, risk and readiness assessments)/ Compliance, quality and compulsory requirements</p>
<p><b>Name:</b> José Figueroa, Information System Director</p>	<p><b>Role:</b> IT Solutions Director Systems capabilities, connectivity, reliability for continuity, technical call center support, access controls and service agreements between client and TeleMedik.</p>
Measurements:	
<p><b>Estimated Costs:</b> \$825,395.81</p>	<p><b>Actual Costs:</b> \$1,812,388.52</p>
<p><b>Reason for change in cost:</b> Changes in business model and membership volumes. Service assumptions has expanded during the years. Multiple addendums have been made for the first contract.</p>	
Measurements:	
<p><b>Original Value of Vendor's Contract:</b> \$897,169.35</p>	<p><b>Actual Total Contract Value:</b> \$1,948,804.86</p>
<p><b>Reason(s) for change in value:</b> Contracts were defined for one, or two years. Afterwards service agreements are defined with amendments for one-year automatic renewals.</p>	

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<b>Estimated Start &amp; Completion Dates:</b>		
	<b>From: Abril 2015</b>	<b>To: Present</b>
<b>Actual Start &amp; Completion Dates:</b>		
	<b>From: Abril 2015</b>	<b>To: Present</b>
<b>Reason(s) for the difference between Estimated and Actual dates:</b> Contracts were defined for one, or two years. Afterwards service agreements are defined with amendments for one-year automatic renewals.		
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: Services are provided by TeleMedik employees.		

**Attachment D. Vendor Organization and Staffing**

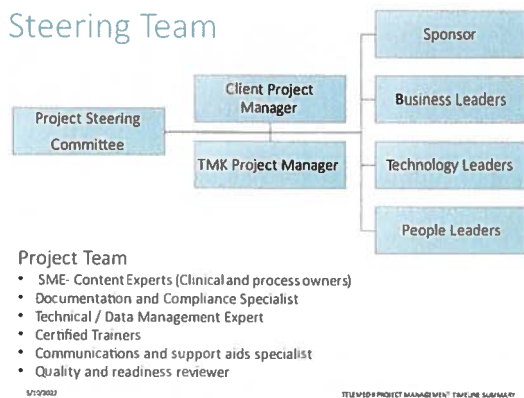
This section will provide instructions to vendors to submit their approach to staffing the contact center using Attachment D: Vendor Organization and Staffing

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2022-PRMP-MES-Contact Center-004  
May 11, 2022**

**Attachment D: Vendor Organization and Staffing**

**D.1 Initial Vendor Organization and Staffing Plan**

During the past 25 years TeleMedik has grown and expanded its operations to meet the different needs that arise from multiple projects. These experiences have allowed the development of practices, that guarantee the joint fulfillment of key dates, and integrated activities with groups of interest for the project. The project methodology is simple and practical but aimed at results, identification of barriers and continuous monitoring of progress.



A Steering Committee composed of PRMP representatives, key suppliers and TeleMedik; will direct and monitor the progress of the Project Team. A Project Manager from each partner (Client and Supplier) will hold the project meetings and lead the efforts of the multidisciplinary team. A specific detail of roles, responsibilities and expected outcomes per role is available upon request.

*Illustration A - Steering Committee*

Our Project Model considers flexibility, but continually anticipates the level of capacity or readiness achieved to perform as expected and measures the level of readiness and risks at key milestones or phase. The Project Model dimensions include, but are not limited to the review of:

1. Project Management and key dates
2. Service Process Flowcharts
3. Documentation and communications
4. Staffing and training
5. Systems Infrastructure
6. Facilities
7. Access and Controls

Below, we include the key phases of the project and suggested dates for review and agreements. Each phase summarizes some of the key deliverables for reference. This plan may vary according to client review.



**a. Project Model**



Below, a summary as an example of key deliverables or deliverables by project phase.

**Table #6: Project Phases**

PROJECT PHASE	SUMMARY OF KEY DELIVERABLES
Contract and Project Equipment Settlement	<ul style="list-style-type: none"> <li>• BAA and documentation for contract signatures</li> <li>• Revision, discussion and understanding of communication strategy between persons / key groups (agency, current service provider / other service providers or related suppliers)</li> <li>• Setup of Steering Committee</li> <li>• Setup of Project Team</li> <li>• Meeting structure, communications, meeting places, etc.</li> <li>• Transition agreement validation with actual vendor and expectation validation and viability of interviewing actual incumbents</li> <li>• Roles and responsibilities revision</li> </ul>
Actual Situation Analysis	<ul style="list-style-type: none"> <li>• Actual process and opportunities analysis</li> <li>• Analysis, current vendor incumbent interviews – actual provider if defines vendor</li> <li>• Information Systems (Communications, telephony, files, etc.)</li> <li>• Structure and key contact of implicated teams or Offices</li> <li>• Script analysis, processes, metrics and opportunities</li> <li>• Readiness Assessment</li> <li>• Risk Assessment</li> <li>• Identification of available Talents Bank (vendor, internal, and/or other referral sources)</li> </ul>
Approval of Design and Blueprints and Business Cases	<ul style="list-style-type: none"> <li>• Flowcharts - Blueprints</li> <li>• <b>IVR Design maps to be developed</b></li> <li>• Vendor transition plan and due dates</li> <li>• Structure to be approved</li> <li>• Existing policies inventory and new to be created</li> <li>• <b>Call Scripts inventory to be developed</b></li> <li>• <b>Case identification / scenarios / Business Cases</b></li> <li>• Conceptual design of development intervention curriculum for                             <ul style="list-style-type: none"> <li>○ On-Boarding</li> <li>○ Annual functional curriculum - schematic</li> </ul> </li> <li>• Signed and Approved Document inventory</li> </ul>

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PROJECT PHASE	SUMMARY OF KEY DELIVERABLES
	<ul style="list-style-type: none"> <li>• Recruitment and selection strategy</li> </ul>
Development	<ul style="list-style-type: none"> <li>• Content design for each content defined inventory</li> <li>• Flowchart / processes / <b>development of routes according to IVR maps</b></li> <li>• Policies / Forms / Service Continuity Protocols / Communications</li> <li>• Equipment preparation and information systems</li> <li>• <b>Case Development / Business Cases scenarios to be used for tests and for training purposes</b></li> <li>• Training design tables and presentations content</li> <li>• Internal SME Train the Trainer Certification for personnel participating in official initial training offered by client</li> <li>• Presentation development</li> <li>• Evaluation strategy according with expected levels and interventions</li> <li>• Readiness Assessment</li> <li>• Risk Assessment</li> <li>• Action plan to close any identified breach</li> <li>• Recruitment and selection of candidates with tools for their functions</li> </ul>
Preparation phase and test (Pre-Go LIVE!	<ul style="list-style-type: none"> <li>• Test and validation of processes, systems, etc.</li> <li>• Process validation, systems, access, authority levels granted</li> <li>• <b>IVR test and acceptance by users</b></li> <li>• <b>Users Acceptance Test following scripts for different functionalities and technical areas</b></li> <li>• Actual vendor transition plan and due dates – revision and closing</li> <li>• Action plan for GAPS closing</li> <li>• Access and authority levels</li> <li>• Users training (different levels)</li> <li>• Readiness Assessment</li> <li>• Risk Assessment</li> <li>• <b>Change management and integration</b> of current personnel working with client or actual service vendor that could be hired.</li> </ul>
Go-Live!	<ul style="list-style-type: none"> <li>• Evaluation Plan</li> <li>• Daily progress report</li> <li>• Key functionality certification document in function and adherence</li> <li>• Case evaluation</li> <li>• Customer Service Representatives' evaluation</li> <li>• Supervisors' evaluation</li> <li>• Process cycle evaluation by Quality and Compliance with observations and recommendations</li> <li>• Identification of areas to be reinforced and improvements - Action Plan</li> </ul>

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TeleMedik has demonstrated over the time, the capacity to absorb projects in the shortest time possible, guaranteeing an effective transition and in compliance with the agreements and expected results.

**b. Staffing Plan**

Our Staffing Plan includes but is not limited to the following considerations:

- ✓ We have an internal pool of resources that are well trained in all GHP core processes, regarding Service Lines. This includes members, providers and pharmacy services.
- ✓ Due to our PEOPLE ratios trends, we have established 24% shrinkage within our workforce planning forecast.
- ✓ Multiple sources are established to support hiring and staffing processes.

**Table #7: Staffing Timeline Activities**

Phase I: Staffing Analysis	
Calls Volume and Workforce <ul style="list-style-type: none"> <li>▪ Evaluation</li> <li>▪ Forecast*</li> </ul> This forecast should consider normal transition for current PRMP-GHP provider, plus the transition to the new system and its expected go-live dates	TBD
Phase II: Internal and External Recruitment Analysis	
Current Employees Performance Ranking <ul style="list-style-type: none"> <li>▪ Quality Indicators</li> <li>▪ Attendance &amp; Punctuality Ratios</li> <li>▪ Performance History</li> <li>▪ Other requirements (function-related)</li> </ul>	As soon as contract is awarded
External Recruitment (applicable) <ul style="list-style-type: none"> <li>▪ Pre-screening</li> <li>▪ Telephonic Interview</li> <li>▪ Competency Tests</li> <li>▪ Face to Face Interview</li> <li>▪ Work Fitness Test (Role-play)</li> </ul>	TBD
Phase III: Hiring Process	
Employees Designation <ul style="list-style-type: none"> <li>▪ Contract Signing</li> <li>▪ Background Check</li> <li>▪ Training Delivery (<i>see below</i>)</li> </ul>	Within the last month of go-live date
Phase IV: GO LIVE!	
Go live Date- Refresh, rehiring and retraining as needed and assessed by the Quality and Operations areas	
Staffing Planning is a cyclical process, therefore will be executed on a monthly basis.	

**c. Training Plan**



Our Training Plan includes but is not limited to the following considerations:

- ✓ We have an internal pool of resources that are well trained in all PRMP/GHP core processes, regarding Service Lines. This includes members, providers and SOW services.
- ✓ We expect to have current employees as well as new hires assigned to Development Program (DP) and On Boarding Program (OBP), respectively.
- ✓ Our Compliance and Compulsory Program is a requirement for any new employee. The total training length could vary, considering client requirements and employees classification (full-time / part-time).
- ✓ Our OBP takes a minimum of four weeks and could vary, considering client requirements and employees classification (full-time / part-time).
- ✓ All trainings could be offered by the client’s experts; an exception would be Train the Trainers initiatives, in which a Subject Matter Expert (SME) could visit the client, receive in-house training, and then will provide an internal training for the rest of the employees.
- ✓ All training material and methodologies could be designed or revised by our Training Team; as part of our development philosophy: TeleMedik University, we are committed to provide the best learning experience for our resources and will work closely with our client to assure expectations and requirements alignment.
- ✓ Critical objectives and knowledge content for performance will be evaluated with multiples testing approaches (for example: cases review, discussions, monitoring and post-tests), ensuring we are in compliance with the different level evaluation ranges.
- ✓ Our Training Team consists of Organizational Development Professionals, Subject Matter Experts (internal Train the Trainer certification), Peer Coaches, Supervisors, as well as external resources.
- ✓ We maximize the employee’s learning experience through different methodologies: virtual, on-the-job, classroom; various approaches: Listen, Observe, Tell, and Do. Therefore, we strongly encourage the possibility of a Training Environment, in which the employee will have the opportunity to practice with the applications, in a secure environment.
- ✓ We will ensure compliance with training regulated topics, including upon hiring orientation and annually refreshers: HIPAA, Fraud, Waste & Abuse, Cultural Competency Model, Code of Ethics, Human Resources Policies, Model of Care, Compliance, URAC, among others.
- ✓ We will ensure the best quality service index, through our trainings and re-trainings that cover fundamental skills: Quality & Service Models.

**Table #8: Training Timeline Activities**

Phase I: Training Analysis	
Contractual Agreements & GHP Service Lines Changes Analysis <ul style="list-style-type: none"> <li>▪ Client Policies &amp; Procedures Alignment</li> <li>▪ Operational Flowcharts</li> <li>▪ Training Initial Assessment</li> </ul>	TBD
Phase II: Training Design & Development	

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Professional Development for Current Employees and On Boarding Program Re-design for New Hires (if applicable) <ul style="list-style-type: none"> <li>• PRMP Service Lines</li> <li>• Client Apps, process and procedures</li> </ul> This phase will include Training Specialist and SMEs exposure to our client’s applications and Training Methodologies. Preparation of Training Environment is desirable.	TBD
<b>Phase III: Training Delivery</b>	
DP and OBP will be activated <ul style="list-style-type: none"> <li>▪ Groups of 10-12 Employees per Training Session Will be the ideal, but time frames and expected go-live will make this vary.</li> <li>▪ Training Environment</li> </ul>	TBD
<b>Phase IV: GO LIVE!</b>	
According to client	
Training Planning is a cyclical process, therefore will be executed on a monthly basis. We will pay special attention to realign or reinforce, as needed.	

**Commitment with results**

Our experience in managing the change of insurance plan companies in the different engagement cycles of the Government’s Health Plan (Medicaid); during the past 10 years; demonstrate our ability to meet deadlines; managing changes of vendors or suppliers in a transparent manner and demonstrating a high commitment in teamwork and meeting objectives. Rigorous implementations in the aggressive relocation of operations in simultaneous locations in coordination with multiple suppliers of our customers and ours, has proven to be very effective and planned, consistently receiving the recognition of our clients.

The variety of services we offer can be offered in different ways:

- a) Complete delegation of functions using our applications and sending reports to the client
- b) Partial delegation; using client’s systems and applications
- c) By service demand; this means; for management of excess volume or peak periods, as contingency or for services out of regular working hours.

All these modalities under which we make use of multiple resources, including applications of clients or suppliers recognized in the market, require coordination and logistics. Internal knowledge also allows us management and resolution without necessarily depending on third parties. This makes a difference particularly in the provision of connectivity, data management, IVR development, recordings, etc.

Systems and alternate procedures are provided under our Policies and Procedures to handle situations which are not under our control, but at the same time, requires of an alternate procedure to ensure continuation of services.

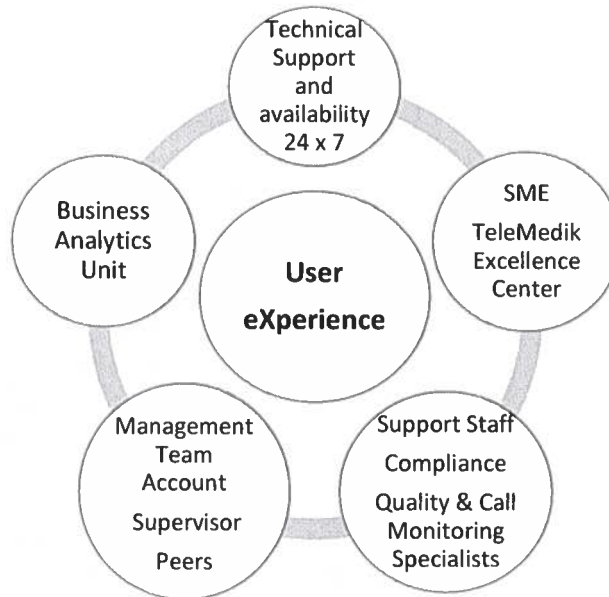
**Transition Process**

As part of the work plan to guarantee an effective and agile transition, and guarantee service indicators, we will join efforts to review and update the applicable training design; including a Train the Trainer certification and development of tools to measure the success of the learning interventions carried out.

**D.2 Key Staff Resumes, and References**

TeleMedik has a multidisciplinary team of professionals with long tenure and experience in managing implementations similar to what is expected in this RFP. A combination of disciplines is guarantee to ensure a systemic approach for the success of the project.

**Contact Center Key Components:**



*Illustration B - Contact Center Key Components*

**Table #9: Proposed Key Staff and Roles**

Name	Proposed Role	Experience in Proposed Role
Wanda López	Contact Center Director	Responsible for the planning, forecast of needs and operational activities to serve and meet the agreed performance guarantees and Key performance Indicators ensuring efficiency and efficacy. Since 2013 she has been involved and leading major implementations and assigning the best resources according to each client specifications.
Yahaira Feliciano	Contact Center Manager (Account Manager)	Over 17 years of experience in Customer Service and knowledgeable of the Government Health Plan. Grown from within as Customer Service Representative, has been recognized for her leadership skills and service-oriented approach with clients. Accessible and results driven; has become a leading expert on Medicaid requirements and PR Government Health Program.
Sonia Montes	HR Director	Over 5 years of experience in managing the adquisition, retention and development of Telemedik staff and teams. Communicates and continuously monitor with businesses

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		the trends and results of our People and proposes strategies to ensure the engagement and wellness of our employees. Establishes action plans and has demonstrated successful metrics in the hiring and staffing processes to meet business metrics and quality standards. Actively participates in the implementation of new accounts and is accountable for the monitoring of best practices in compliance with each client requirements.
Nardelis Soto	Training and OD Manager	Industrial Psychologist, with experience in the development of training strategies according to the environment and business goals. Measures training and development methodologies effectiveness and support the business in assessing needs for future or current skills development. Certifies Trainers and establishes the activities under the project plan to ensure the best Change Management Plan to promote the adoption of new practices.
Edwin Vélez	Innovation Director	Evaluates new options in the market to promote efficiency in the management of the Contact Center Operations. Directly involved in the definition of strategies to increase contact ratios; reporting tools, outreach strategies, quality monitoring tools and automated options to present according to most frequent inquiries. (Chats, Chatbots, SMS, Etc.)
Edgar Ramírez	Compliance Officer	Assess risks, review Annual Corporate Plans (Quality and Compliance Plans) and establish monitoring strategies to close gaps and prevent risks. Participates actively as part of the Implementation Team and serves as a key liaison between parties, serving as expert in CMS regulation and auditing processes.
Jose Figueroa	IT Director	Participates in the project team of any new implementation and assess and assign the IT/ Communications, System experts to ensures a smooth transition between the current vendor and new provider.
Carlos Cabrera	Information Security Officer	Asses each client risks and defines project readiness related to security, access and technology.
Nelson Alamo	Quality Specialist	Defines and review the Quality monitoring dimensions to be calibrated with client according to internal policies. Monitors employees calls and support with strategies to promote excellence and FCR.
Customer Services Representatives	Contact Center Services	Attached the Job Description for reference (Appendix)

**Resumes:**

Current Role | Contact Center Services Management Director  
Jaye, Inc. DBA TeleMedik.

## WANDA LOPEZ CORTES

### TOP QUALIFICATIONS

- Thirty-three years of experience supervising large contact centers operations with more than 300 service associates, administrative staff up to the manager's position. Coming with the years from a hierarchy administrative structure to a flat and very participative administrative structure.
- Create Contact Center strategic and operational goals for the staff and oversee staff performance using a 360-evaluation process. Experience introducing annual goals and performance standards and core values for each position as well as aligning the job descriptions for each position.
- Vast experience and responsible managing client contracts with specific performance guarantee and reporting requirements among other service agreements. Expertise coordinating new clients on boarding process, personnel requirements, obtaining the skills and the training coordination to start an account.
- Very up to date methods of communicating changes without affecting the center environment and the employee's loyalty. Sharing the company's goals, results, challenges, and plans we engage our people in our day-to-day commitments. Using different ways of communication, we reach out the different generational population.
- We retain 99% of our contact center customers by keeping and maintaining the contact center industry standards and best practices also growing our contact center base up to a 2% yearly.
- Project manager experience that facilitates the implementation of crucial changes, new accounts as well as structural changes in the contact center.
- Assisting top management on initiatives, programs and operational goals that are part of the Company's strategic plan
- Having the biggest population of customer service staff, I am an active member of the strategic committee and the only operational staff participating in cultural committees that usually are done and deployed by the Human Resources departments in many companies.
- Member of the Quality and Compliance Committee because of our constant improvement projects and active participation in overseeing that every employee is complying with our policies and company's procedures.
- Learning and studying new contact center technologies and tendency to maximize and optimize the existing contact center tools to project call traffic and staffing.
- Reduction driven and focused on process automation to reduce expenses and improve performance.

- Experience managing medical advantage accounts for eligibility support and enrollment and disenrollment process during the CMS assign enrollment and disenrollment period.
- In charge of the actual health government plan customer service and provider services as a vendor for the insurance companies in the Island of Puerto Rico
- Partnering with all support departments such as Compliance, Contracting, finance and HR to ensure that the operations are performing under the regulations that applies to the business.

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**EDUCATION/CERTIFICATIONS**

**METROPOLITAN UNIVERSITY OF PUERTO RICO**

- Master's in Business Administration

**PACE UNIVERSITY**

- Bachelor of Arts in Secondary Education

**CERTIFICATIONS**

- Project Management
- Quality Program from George Washington University
- Real Estate Broker License 12852

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**RELEVANT EXPERIENCE**

**TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, CONTACT CENTER SERVICES  
MANAGEMENT DIRECTOR**

Operating the contact center with government and commercial accounts for Health Care companies. Overseeing accounts implementation, that includes identifying the services to be offer; the skills necessary to hire the resources, system applications, training material, facility spaces, schedules, reporting performance tools and frequency. Also participate in the selection of managerial staff and technical tools such as telephony and IVR needs. Manage customer service, pharmacy, and Nurse advice line for multiple clients. Coordinate operations in two sites in the Island with an average of 300 positions. Look over the operations to comply with customer's performance guarantees and exceed their expectations; with that as our main goal we run quality projects to look for constant process improvements that will assure the highest quality results. During the past year we improved the hold indicator in more than a 40% and the service level in a 35%. Great achievement modifying the organization structures that allow us to improve our performance, supervise the entry level accordingly and keep a positive and enthusiastic environment. Create an ACD administration unit that monitors call traffic results using self-created programs and modify reporting tools for our internal and external customers. Create a callback/help desk unit to solve customers' issues that cannot be solved with the customer online. To measure the unit performance, we established timeframes to ensure the team was performing accordingly to service high standards. The objective to return an answer to our customers moved from 75% compliance to 98% compliance in a year. Implement strategies to reduce turn over in the contact center that reached a 50% reduction in a year. Being a contact center that provides services to multiple clients we work constantly to create and overcome issues

that affect the working environment. Establish recognition plans a free expression space to reduce stress. Communicate results, changes, and challenges to our internal and external customers. Plan and implement a work @ home migration to ensure the pandemic season did not affect services offered to our customers. Stablish new retention strategies after the COVID-19 season to reduce an impact on turn over. New administration structure was defined to improve the supervisory duties.

#### **CASIANO COMMUNICATIONS**

Responsible to establish a new Customer Service unit to serve and retain the customer base and Telemarketing Operations for all company's products. Also based on company's goals, the personnel requirements skills were identified, hired staff and includes documenting, writing policies, procedures, objectives, monitoring indicators, evaluations and creating a training program. Responsible for the Circulation growth and the administration of the data base that supports circulation/promotions and publications.

#### **CENTENNIAL DE PR, OPERATIONS DIRECTOR**

Responsible for overall performance and operations of the Contact Center for personal and business accounts, Credit & Collections, Customer Service, Customer Care, Wireless Technical Support, Help Desk, Business Process Improvement Dept., Internal Training Department, ACD Administrators, E-Services. Direct supervision of 18 managerial associates and 225 indirect employees. Responsible for maintaining high moral trough activities, production incentive programs, increasing internal customer satisfaction and improving associates' surveys results. Responsible for the hiring, training, coaching programs, and appraisals compliance for the contact center. Responsible for the creation of job descriptions for all contact center employee levels; also responsible for the evaluations tool with measurable objectives. In charge of the physical and technological infrastructure. Prepare budget proposals to acquire new technologies for the Contact Center; doing market research, technology plans, ROI and working plans to obtain top management approvals. Supervise vendors' negotiations, contracts, and trades. Responsible for maintaining and reducing capital budget and operational budget every fiscal year. Maintain and monitor infrastructure costs and present new market tendencies to reduce operational cost. Create new center structure, improve associate's skills needs and improve recruitment process. Implemented an ACD and PBX for the contact center. Improved abandonment results from a 12% to a 5% adding trunk capacity. Reduced direct traffic to the contact center from 120% to 70%. Implementation of an IVR system to increase efficiency of Call Center. Significantly improve collections results thus reducing bad debt and write off accounts. Reduce the Churn rate from 2.6\_\_ to 2.0\_\_ through the implementation of a Churn Reduction Predictor module. Created a Chat unit for customers that prefer e-mail communication. Implementation of skill levels concept and a monitoring technique an E-learning system was implemented to increase effectiveness and quality service of the center. Create E-services division obtaining a 96% on 24hrs turn around compliance.

## YAJAIRA FELICIANO DELGADO

**TOP QUALIFICATIONS** Good verbal and written communication skills. Creation reports, action plans "CAPS" "KPI'S", account analysis, corrective actions for performance and general rules of conduct, and creation of projections and schedules. Usage of computer programs Word, Excel, PBI and Power Point. Ability to work under pressure, learn quickly and maintain good working relationships. Organized and punctual.

**EDUCATION/CERTIFICATIONS** **UNIVERSITY OF PUERTO RICO, BAYAMON CAMPUS**

- BA - Business Administration with a concentration in Marketing

**RELEVANT EXPERIENCE** **TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, CONTACT CENTER MANAGER**

The Accounts Manager oversees and supervises the Customer Service Representative, including primarily Customer Service Representatives, for key accounts. The employee is responsible for the implementation of training and development programs, quality indicators and performance evaluations for all the personnel under his/her supervision.

Executive Summaries. Monitor and ensure that established protocols and procedures are followed. Plan, analyze and monitor performance metrics and indicators and results to meet account expectations. Management of assigned budget ensuring compliance with financial parameters and objectives. Develop goals and complete performance reviews. Guarantee the confidentiality of the internal or external situations of the clients. Conduct disciplinary action process and behavior techniques for staff under supervision. Identify growth opportunities within accounts and collaborate with the leadership team to ensure growth is achieved. Identify training and retraining needs for the supervised group. Standardization of uniform processes and practices between accounts. Strategies to increase resource retention or presentations. Meetings with clients. Development of action plans (CAPS, ICAPS and KPI'S). Data analysis and reports. Maintain or increase optimal efficiency levels.

**PSG Accounts Supervisor**

Manage 'Vital' accounts (PSG). Account Monitoring. Creation of strategies and reports. Executive Summaries Presentations. Creation of efficiency projects. Group Meetings. Meetings with Clients. Call Monitoring. Identify growth opportunities within accounts and collaborate with the leadership team to ensure growth is achieved. Development of action plans (CAPS, ICAPS and KPI'S). Data analysis and metrics reports. Validate and verify the number of resources assigned to the account according to call volumes. Individual development sessions "Coaching". Creation and discussion of corrective actions. Staff training. Monitoring of protocols and processes. Ensure compliance with company policies, standards, rules and procedures. Usage of multiple internal and external applications

**Supervisor of Multi-lines,**

Management of multiple business accounts: Medicare advantage (CS and Providers), Pharmacy, Commercial Accounts, Determination projects,



information search and case creation (OCU, WI), Alarm receiving center. Appointment coordination project, Management of different external and internal applications: (Avaya, Call Copy, PHMS, VMWare, QNXT, ESSETTE, Medhock, MC-21, Xpress, Visual vault, Voyager; Rx platform, Bachman (Rx) Davinci and Hipócrates, CRA (alarm receiving center), Account Management, Account Monitoring)

## SONIA E MONTES RIVERA

### TOP QUALIFICATIONS

- Accomplished executive career with over 25 years' experience in operational leadership, human resources management and organizational development in highly successful organizations.
- Skill in handling sensitive issues with diplomacy and objectivity.
- Effective team member who is comfortable with leading and collaborating.
- Excellent skills in analysis, strategy and planning.
- Thoroughly explore all avenues and options in solving problems.
- Computer proficiency.

### EDUCATION/CERTIFICATIONS

#### **METROPOLITAN UNIVERSITY, SAN JUAN PR**

- Master in Business Administration (MBA)

#### **UNIVERSITY OF PUERTO RICO, SAN JUAN PR**

- Bachelor of Arts in Social Sciences, Major in Labor Relations

### RELEVANT EXPERIENCE

#### **JAYE, INC. DBA TELEMEDIK, GUAYNABO PR | PEOPLE STRATEGIC SERVICES DIVISION (HUMAN RESOURCES) DIRECTOR**

Provides leadership and guidance to the HR operations. Responsible for setting, enforcing, and evaluating legally compliant human resources policies, procedures, and best practices, and identifying and implementing long-range strategic talent management goals. Collaborates with executive leadership to define the organizations long-term mission and goals; identifies ways to support this mission through talent management. Identifies key performance indicators for the organizations human resource and talent management functions; assesses the organizations success and market competitiveness based on these metrics. Researches, develops, and implements competitive compensation, benefits, performance appraisal, and employee incentive programs. Provides guidance and leadership to the human resource team; assists with resolution of human resource, compensation, and benefits questions, concerns, and issues. Ensures compliance with employment, benefits, insurance, safety, and other laws, regulations, and requirements. Maintains knowledge of laws, regulations, and best practices in employment law, human resources, and talent management. Drafts and implements the organizations staffing budget, and the budget for the human resource department.

#### **AGMUS VENTURES, INC., ORLANDO FL | CHIEF HUMAN RESOURCES OFFICER**

Responsible for the strategic planning and implementation of human resources programs, including staffing, wage and salary administration, leave administration, performance appraisal, employee relations, benefits program administration, rewards and recognition programs, payroll, development and training. Provides leadership for human resources strategies to ensure high quality staffing and retention of personnel. Recommends and implements legally sound and effective human resources management programs, policies, and practices. Ensures that human resources programs are cost effective and budget are managed prudently. Develops and monitors the annual budget for the department. Implements the policies established by federal and state laws, in the area assigned (Florida, Maryland and Texas). Ensures that department operations contribute to the attainment of the organizational goals and objectives. Develops and maintain human resources information systems for data entry, tracking, and information management. Analyses wage and salary data and recommend effective compensation plans for administrative personnel and faculty. Manages the health insurance, optional employee benefits, workers compensation, and unemployment compensation benefit programs. Manages the 401k plan to ensure compliance and effective administration. Works with administrators and executives to forecast staffing needs and develop staffing plans. Develops and

implements talent acquisition, career development, succession planning, training and leadership development plans.

**ANA G. MENDEZ UNIVERSITY SYSTEM, SAN JUAN PR | ASSOCIATE VICE PRESIDENT FOR  
TRAINING AND ORGANIZATIONAL DEVELOPMENT**

Contributes to the design and delivery of people and organizational development strategies and the change management processes in support of the institution's strategic and operational plans, providing information, advice, and services required. Works with teams across the institution performance improvement which contributes to becoming a high performing organization. Conducts an organizational readiness review and make recommendations on corrective actions. Designs and implements procedures, such as performance evaluation and job description analysis. Facilitates conflict resolutions strategies. Implements role clarification strategy for managers and employees. Performs a gap analysis to compare the as-is organization to the to-be organization. Develops an action plan to achieve the to-be organization. Facilitates employee relations process during change management processes. Plans, designs, and facilitates meetings, trainings and activities related to organizational development. Develops and implements career development, succession planning, training, and leadership development plans. Prepares statistical reports, executive summaries and presentations.

## NARDELIS SOTO SANCHEZ, PHD

**OVERVIEW** Professional successfully leading and implementing organizational development strategies, with Industrial Psychology competency, and proven track record implementing the Psychologically Healthy Organizations Model in various industries. Highly competent supporting corporate leaders and decision-makers to enhance efficiency and quality performance. Recognized by colleagues and employers for integrity, resourcefulness, entrepreneurship, and initiative.

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### EDUCATION/CERTIFICATIONS

#### INTERAMERICAN UNIVERSITY OF PUERTO RICO, CAYEY CAMPUS

- PhD Degree in Industry Organizational Psychology
- MA Degree in Industry Organizational Psychology

#### SPECIALIZED SEMINARS & CERTIFICATIONS

- TEAM Coach Certified
- Mental Health First Aid Certification, National Council for Community Behavioral Healthcare
- Entrepreneurship Educators Certified
- Lean Green Belt Certified Professional; *Professional Excellence Corporation*.
- SHRM-Senior Certified Professional
- Project Management Course, People's Advantage

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### RELEVANT EXPERIENCE

#### TELEMEDIK & TELEMEDIK INNOVA HEALTH SOLUTIONS, TRAINING AND ORGANIZATIONAL DEVELOPMENT MANAGER

Formulate and implement training programs, applying principles of learning and individual differences. Analyze training needs to develop new training programs or modify and improve existing programs. Plan, develop, and provide training and staff development programs, using knowledge of the effectiveness of methods such as classroom training, demonstrations, on-the-job training, meetings, conferences, workshops and virtual training. Train instructors and supervisors in techniques and skills for training and dealing with employees. Prepare training budget for department or organization. Facilitate organizational development and change. Coach senior executives and managers on leadership and performance. Study organizational effectiveness, productivity, and efficiency, including the nature of workplace supervision and leadership.

**CRESCERE CONSULTING GROUP, ORGANIZATIONAL DEVELOPMENT CONSULTANT & OWNER**

Develop talent capability assessments, coaching/learning programs, workshops, seminars and other events to enhance personnel & professional skills. Evaluation of organizational structure designs. Develop organizational assessments to ensure the linking of organizational strategies with the model of Psychologically Healthy Workplace (PHW) ensuring the relationship between the welfare of the employee and the well-being of the organization. Employing scientific methods for data collection used in organizational decision-making through focal groups, surveys, and interviews. Support organizations to design and develop projects such as Performance Evaluations, Competency Model, Employee Recognition Program, Corporate Volunteer Program, Medical Surveillance Program, among others. Coach Teams to help organizations achieve strategic objectives, enhance leadership capability, and create culture change.

**UNIVERSIDAD DEL SAGRADO CORAZÓN, LEARNING & DEVELOPMENT DIRECTOR**

Plans and implements talent capability assessments, coaching/learning programs, workshops, seminars and other events to enhance personnel skills, and enrich support to staff and faculty members in order to obtain optimal educational results. In close coordination with the VP of Academic Affairs, designs, and implements the University centralized faculty development strategy. Facilitates the faculty coaching on effective learning techniques & instructional technologies. Coordinates with ITI department the on-line courses certification and other technology trainings. Using the Annual Performance Management System to identifies the common and specific training needs for all employees (faculty and staff) and recommends the annual training/development plan. Compiles data and reports on personnel development activities and outcomes. Evaluates effectiveness of training initiatives using the Kirkpatrick Model. Provides support to the VP of Organizational Development & Human Resources in the evaluation of structure designs and manage the rotation program. Implement a Succession Planning process for leadership and critical positions. Creates and maintains electronic handbooks, instructions, and other materials to support learning and development activities. Participates in the University's governance, curriculum planning, and functions to support the development and growth of the institutions. Serves on programmatic and University committees, as assigned. Manages the annual training and development budget. Support other organizational projects such as Performance Evaluations, Competency Model, Employee Recognition Program, Corporate Volunteer Program, Medical Surveillance Program. Support labor relations issues.

**EMPACADORA HILL BROTHERS, ORGANIZATIONAL EXCELLENCE MANAGER**

Responsible for compliance with the annual organizational development projects and their alignment with the strategic goals of the company.

Ensure the linking of organizational strategies with the model of Psychologically Healthy Workplace (PHW); ensuring the relationship between the welfare of the employee and the well-being of the organization.

Analyze the departmental components to strengthen their structure and internal harmony, as well as the rest of the organizational structure.

Applies the knowledge of organizational industrial psychology in the analysis of recruitment and selection, compensation and performance structures.

Lead the development of the company's Strategic Plan, facilitate meetings with the team and follow up on the agreements, ensuring compliance with the strategies within the established time. Analyze internal processes using tools for continuous improvement. Manage the system of individual and departmental performance metrics. Analyze the organizational structure and provide recommendations that result in being efficient in the distribution of human resources.

**Industry Organizational Psychologist**

Leading review of daily inventory taking process using the Lean Methodology reaching: 37% reduction in time, 83% material reduction and improving the process cycle efficiency from 49% to 93%. Overseeing the organizational and professional development programs; executing consulting to managers and mid-level supervisors related to planning, conflicts resolution, talent development, communications, motivation, project management, leadership styles and accountability, among others.

**TRIPLE S MANAGEMENT, TRAINING & ORGANIZATIONAL DEVELOPMENT COORDINATOR**

Directed the Triple S Group participation in the Psychologically Healthy Organizations Program. Led the Organizational Commitment Action Plans Project as well as designed, coordinated, implemented, delivered, and evaluated personnel development programs in the 8 subsidiaries. Designed, implemented, and delivered educational presentations during the Domestic Violence in the Workplace Prevention Week, designed, and directed the Professional Development Week. Organized and participated in the design of the New Employees Orientation Programs, the Supervision and Strategic Leadership School, and the Triple-S Mentoring Team. Efficiently coordinated multiple internal and external resources to support departmental projects. Supervising internal students of industrial organizational psychology.

**PUERTO RICO PSYCHOLOGY ASSOCIATION, EXECUTIVE DIRECTOR**

Led full management including the facilities and fiscal administration. Supervised and evaluated employees as well as student interns. Ensured compliance with state and federal regulations. Designed, reviewed, and implemented administrative procedures; performed budget management, coordinated strategies for membership and revenue growth, created professional growth plans and coordinated training.

## EDWIN VELEZ TORRES

**TOP QUALIFICATIONS** Analytical, results-oriented operations management leader with 25+ years of experience in customer service, financial services, fraud management, and corporate security. Strategic planner with solid track record improving customer experience, increasing customer loyalty and sales, reducing delinquency and churn, improving call center metrics, preventing losses due to fraud and inventory shrinkage. Cross-functional team leader and manager with ability to resolve customer disputes and enhance operational efficiency. Highly effective written and oral communication skills, collaborating effectively with team members and senior management as well as outsource service partners.

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Customer Service / Customer Retention: Face-to-face retail channel and call center for consumer, business, and government accounts</li> <li>• Strategic Planning &amp; Change Management</li> <li>• Corporate Security: Fraud Management, Loss Prevention, and Investigations</li> <li>• Telemarketing</li> </ul> | <ul style="list-style-type: none"> <li>• Credit and Collections: Consumer, business, and government accounts</li> <li>• Enterprise Resource Planning (ERP)</li> <li>• Regulatory Compliance &amp; Best Practices</li> <li>• Contract Negotiation</li> <li>• Team Leadership</li> <li>• Business Management &amp; Accounting</li> </ul> |
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**EDUCATION/CERTIFICATIONS**

**UNIVERSITY OF PHOENIX**

- Master of Business Administration (MBA).

**UNIVERSITY OF PUERTO RICO, RIO PIEDRAS CAMPUS**

- Bachelor of Business Administration (BBA), HR Management and Marketing Management

**CERTIFICATIONS**

- Mini Master of Business Administration, (OMMBA) Program | The State University of New York at Buffalo
- Entrepreneurship Essentials Program | Harvard Business School
- Food and Beverage Management Executive Program| Cornell University
- Forensic Accounting and Fraud Examination Certificate | West Virginia University
- Introduction to Fraud Schemes, Association of Certified Fraud Examiners (ACFE)
- Fraud Prevention, Association of Certified Fraud Examiners (ACFE)
- Security Program Design, ASIS International
- Interview and Interrogation Techniques, Wicklander-Zulawski & Associates
- Leadership Training for Managers Program, Dale Carnegie Training

RELEVANT EXPERIENCE

**TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, INNOVATION AND BUSINESS DEVELOPMENT DIRECTOR**

Facilitates the monitoring of Strategic Initiatives, key project and teams. Identify and assess new technologies related to Contact Center Operations. Promotes and manage SPRINT methodologies to accelerate new product /services development. Lead Marketing and Design team for new services development and launch to market.

**LEADING BPO CONTACT CENTER PROJECT, DEVELOPMENT ADVISOR | DIRECTOR OF OPERATIONS**

Oversee customer service call center operations for different campaigns in several industries (Telecommunications, health insurance, government, financial services, utilities, etc.)

**AVENTUS, VICE PRESIDENT OF OPERATIONS**

Responsible for directing the following areas: Customer Service call center operations, Workforce Management, Human Resources, QA, Training, and IT.

Key Contributions:

- Responsible for customer service operations in Puerto Rico, Dominican Republic, Panama, and US
- Successful transition from a brick-and-mortar call center to a combined operation of remote agents (65%) and contact center agents (35%).
- Restructured the Coaching, Quality Assurance, and Audit Department to improve overall operational results
- Developed a QA scorecard based on: Courtesy, empathy/concern, timely resolution, technical knowledge, customer retention, and sales which redefined our focus resulting in an overall improvement of 30% during first 90 days post implementation.
- Developed the Human Resources Department, implemented an effective recruitment process, and implemented changes to the customer service training program which reduced turnover rate by 38% during first 120 days of hiring

**PR WIRELESS, DIRECTOR OF CUSTOMER SERVICE OPERATIONS AND CREDIT & COLLECTIONS**

Directed and managed six managers/supervisors for a total of 20 department staff in customer service, customer retention, activations, fraud management, credit, and collections. Managed one outsource service partner with 85 agents and six administrative staff. Supported the commercial area in migration of Open Mobile customers to Sprint and Boost brands. Oversaw customer service team that provides support to Sprint stores and business accounts. Develop and execute Open Mobile's customer service integration plan into Sprint and Boost business models. Developed and implemented proactive outbound campaigns, including outbound calls, MMS, SMS, and emails, surpassing our customer migration goal by achieving 104% against goal during first five months of campaigns. Generated and implemented sales campaigns to add new lines to recently migrated customers, resulting in 13,520 additional lines during first five months of campaigns.



**OPEN MOBILE, DIRECTOR OF OPERATIONS: CUSTOMER SERVICE, CREDIT & COLLECTIONS AND FRAUD MANAGEMENT**

Managed six managers/supervisors for a total of 20 department staff in customer service, customer retention, activations, credit, and collections. In addition, managed two outsource service partners with 120 agents and 10 administrative staff. Responsible for creation and implementation of customer care policies, procedures, and metrics for the retail channel and call center. Also, responsible for fraud management.

Implemented changes in call center; reducing average handle time (AHT) by 20% and saving approximately \$15.3K per month on headcount. Increased service level from 71% to 88% without increasing headcount cost. Directed the area during the design and roll-out of multiple initiatives, maintaining service and attention levels at 90% and 95%, respectively. Improved quality metrics (based on four key elements: concern, courtesy, timely resolution, and knowledge) from 1.68 to 2.98 on a 0-to-3 scale during the first nine months after implementation. Implemented NPS metric, surpassing our 55-score goal by consistently averaging between 63 and 67. Reduced voluntary churn from 4.5% to 1.2% in the customer loyalty program. Consistently surpassed monthly customer loyalty goal averaging between 99.6% and 112%. Pioneered new credit parameters and changed collection parameters for prepaid customers with device instalment billing, decreasing involuntary churn from 5.7% to 2.6%. Mitigated subscription fraud, establishing policies and procedures that saved the company over \$850K in the first two years. Implemented OCA strategy that significantly increased monthly recoveries from a stagnant 4% to 35%+. Consistently surpassed monthly tele-sales projections (averaging between 98.5 % and 108% over quota).

**T-MOBILE, MANAGER OF CUSTOMER SERVICE, FINANCIAL CARE, AND LOSS PREVENTION - FRAUD**

Oversaw three managers and a total of 27 staff in customer care, credit, collections, and fraud/security/investigations. Managed one outsource service partner totalling 280 agents and 18 administrative staff. Led integration of SunCom Wireless customer service, credit, collections, fraud, and loss prevention areas into T-Mobile business model, systems, policies, and procedures. Oversaw all aspects of loss prevention and internal/external investigations working alongside with local and federal law enforcement agencies.

Consistently positioned Puerto Rico's customer care team (call center and stores) within the first or second position out of 20+ customer care teams in and out of the US—in terms of quality handling calls and voice of the customer metric (VOC). Positioned region's collections team performance between first and second position in terms of: first call resolution, quality of calls (Monthly average between 3.0 and 3.25 where the goal was 3.0), delinquency and involuntary churn reduction consistently averaging below .9% and goal was 1.1%. Developed and implemented collection strategies and an incentive program that increased urgency payment rate from 16% to 35%+ and significantly reduced aging over 60 days from 12.33% to 4.50%. Developed and implemented collection strategies resulting in an involuntary churn reduction of 23.4%. Positioned region's inventory shrinkage (as a % of gross sales) as one of the lowest of the company with less than 2%.

## EDGAR RAMIREZ RIVERA

### TOP QUALIFICATIONS

- Leadership
- Critical Thinking / Problem-Solving
- Decision Making (Results-Oriented)
- Customer/Patient Oriented
- Project Management
- Communication

### EDUCATION/CERTIFICATIONS

#### UNIVERSITY OF PUERTO RICO, SAN JUAN CAMPUS

- Bachelor of Science: Sociology, Majored in Criminology.

#### CERTIFICATIONS

- Certified KPI Professional and Practitioner (C-KPI)

### RELEVANT EXPERIENCE

#### TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, QUALITY AND COMPLIANCE OFFICER MANAGER

Responsible for the execution of the Continuous Quality Improvement Program, which focus is to enhance operational excellence based on the customer experience, quality assurance, efficiency improvement and the staff development/education. Supports top-level decision-making, strategy planning and performance management. Leads different organizational and strategic projects and initiatives and monitors their progress and completion (including URAC accreditation). Optimizes organizational operations or services by executing ideation, innovation and problem-solving concepts and techniques. Advises clinical committees and customer service departments' heads regarding the customer experience, efficiency and regulatory matters.

#### TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, QUALITY SUPERVISOR

Modernized and improved operational procedures regarding the satisfaction surveys, complaints investigations, and key quality procedures to increase efficiency and profitability while tightly controlling costs such as labor and preventing waste. Reviewed the clinical and non-clinical customers' surveys and complaints procedures in order to establish initiatives and activities to improve the patient experience. Implemented Customer Experience training initiatives by incorporating industry trends and collaborating with senior leaders. Directed independent reviews, audits and service's monitoring procedures across the organization to ensure that operational KPI's were followed as required by customers and regulatory agencies. Participated of planning sessions for new product launches by verifying the customer experience. Collaborated with developers and product owners to stay current on product features and intended functionalities.

#### TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, QUALITY SPECIALIST.

Evaluated and monitored key performance indicators (KPI) of various Medicare Advantage and Medicaid Provider's Call Center accounts. Trained, monitored, coached, and mentored staff to ensure best quality of service. Worked directly with other departments and clients to achieve monthly quality

goals. Defined action plans to reduce quality and efficiency variations from goal standards. Represented the company at conferences calls and meetings with clients and participated as a liaison for some external and internal audits.

## JOSE FIGUEROA CORCINO

### TOP QUALIFICATIONS

- Strong Management Experience with Responsibility for the Technology and Information Systems
- Recognized for exceptional problem solving and motivational skills as well as the ability to negotiate, deal and close projects successfully.
- Proven ability to supervise large groups of all level Programmers, Business Analysts, and Project Managers.
- Strong experience in Financial Transaction Processing, Communications with Particular Strength in the areas of Assets, Liabilities, and Customer Support Systems.
- Proficient in the Analysis, Design, Development and Process Improvements of Systems in a Wide Variety of Environments.
- Proficient in understanding and translating customer needs into Business Requirements and successful Implementation of Solutions.
- MVS, TSO/ISPF, SDSF, CICS, COBOL, CA-Easytrieve, VSAM, Z/OS Utilities, IBM Utilities, JCL, FTP, Control-M and Change Man. Microsoft Word, EXCEL, Power Point, VISIO, Project.

### EDUCATION/CERTIFICATIONS

#### UNIVERSITY OF PUERTO RICO, RIO PIEDRAS CAMPUS

- BA with major in Management Information System.
- Course 200001: PMP Exam Prep Coaching.

### RELEVANT EXPERIENCE

#### TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, QUALITY SPECIALIST

Provides direction and supervision to the IS Department. Manages the business unit in accordance to the vision of the company and supports business strategies and tactics within the IS dimensions throughout the organization. Supervises and manages a group of 13+ internals and externals professionals with a total budget of 1.8 million. Supervise the Information System's dimension: Infrastructure, Development, Data Validation and System Security. Supervise the function of the IS Department assuring that the protocols and policies established and approved by organization are followed. Develop, implement and monitor the organizations Disaster Recovery Plan. Evaluate and monitor key performance indicators for the IS functions. Analyze defined key projects and generate forecast to ensure IS resources maximization and profitability.

#### IT STRATEGIC & PROJECT MANAGEMENT CONSULTANT

Provide multi-discipline consulting services to the Puerto Rico Market. IT consulting and outsourcing services in the areas of Business, Operations and Information Technologies. My expertise areas include business technology strategic planning, project management, business management consulting,

information technology management, and systems analysis, design, and development.

Evertec – Support Popular Mortgage (Banco Popular) in the conversion of RES to MSP.

Oriental Bank – Project Manager for Banco Bilbao Vizcaya Integration Project (Consumer and AUTO).

Banco Santander Puerto Rico / Altec PR – Strategic Planning and Project Manager for: Restructured project with 2.6M budget; Capstone Decision Accelerator project with 1.6M budget.

MM Consulting – Project Manager for HP CHAI Project in Dominican Republic.

Triple S - Project Manager and System Analyst for Address Correction Project.

Banco Santander Puerto Rico – Project Manager for Embanking and Homologation de Ancillaries projects. Manages a total project budget of 500,000.

**SISTEMA DE RETIRO PARA MAESTROS, INFORMATION TECHNOLOGY DIRECTOR**

Under general direction from the Executive Director; plans, organizes and directs the activities and operations of the Information Technology Division. Supervises and manages a group of 30+ professionals with a total budget of 1.4 million. Develop Information Technology strategy in support of the agency's mission and core objectives. Direct, control and motivate the staff of the Information Technology department. Develop an annual business plan and operating budget for the department and monitor the implementation of these to ensure that the financial targets are met. Administer the IT budget, staff and physical of the department. Accountable for the management, mentoring and career development of all IT staff. Direct the preparation and implementation of policies, procedures and standards relating to information systems.

## CARLOS CABRERA RIVERA

### TOP QUALIFICATIONS

- **Programming Languages:** Bash, html, Python, PowerShell and Php.
- **OS Platforms:** Windows, Linux, Unix and FreeBSD.
- **Firewall:** Palo Alto, FortiGate (Fortinet), Cisco Meraki and PfSense.
- **Antivirus:** McAfee ePO, Palo Alto TRAPS, Microsoft Defender and ESET.
- **Hardware:** Dell PowerEdge 2950 & T640 and NetApp.
- **Databases:** TSQL, MYSQL, Elastic and SQLite.
- **Web Servers:** IIS, Apache, NGINX and Lighthttpd.
- **Cloud Services:** Azure, AWS and Digital Ocean.
- **Windows Infrastructure Systems:** Active Directory, System Center and WSUS.
- **Server and PC Virtualization:** VMWARE ESXi, Proxmox, Hyper-V, Citrix and Xen.
- **Backup and Disaster Recovery:** Veeam, Druva, Drobox and Ease US solutions.
- **Server Administration:** RSAT, Spice Works, Dameware Mini Remote Control and Any desk.

### EDUCATION/CERTIFICATIONS

#### ANA G. MÉNDEZ UNIVERSITY SYSTEM, CAPEY CAMPUS

- Bachelor of Business Administration Information Systems.

#### CERTIFICATIONS

- Tenable Certified Sales Associate – TCSA
- Palo Alto Networks Accredited Systems Engineer (PSE): Endpoint Associate
- CompTIA Pentest+
- CompTIA A+

### RELEVANT EXPERIENCE

#### TELEMEDIK INNOVA HEALTH SOLUTIONS, INFORMATION SECURITY OFFICER

Diligently maintain the organization information security framework and underlying policies, procedures, standards, and guidelines in coordination with the Information Technology Director. Participate as an active member in Compliance Committee meetings and report to the committee the organizations security gaps, strategies, and results. Take the lead on developing, maintaining, and updating the information security strategy. Actively ensure appropriate administrative, physical, and technical safeguards are in place to protect the organization information security assets from internal and external threats. Meticulously identify, introduce, and implement appropriate procedures, including checks and balances, are in place to test these safeguards on a regular base. Thoroughly conduct and complete annual reviews and audits as required engaging both internal business partners across the organization and external resources. Make it a priority to see that disaster recovery and emergency operating procedures are in place and tested on a regular basis. Act as the committed owner of the security incident and

vulnerability management processes from design to implementation and beyond. Manage and assist in regularly performing security monitoring of information systems including assessing information to determine extend to which key business areas and infrastructure comply with statutory and regulatory requirements. Evaluate and recommend new information security technologies and countermeasures against threat to information or privacy and developing security reports and dashboards. Ensure confidentiality and compliance with all state and federal regulations applicable to healthcare centers, including HIPPA and internal policy of confidential information material.

**CORTELCO, INFORMATION SECURITY CONSULTANT**

Assisted to the chief information security officer and security team on multiple tasks such as access provisioning, logs analysis, and network security. Provisioned, reset, and disabled access to multiple systems. Reviewed the IDS logs to determine possible intrusions through multiple vectors such as account brute forcing, email phishing, malware spread etc. Provided proactive malware analysis through sandboxing to block all possible threats and confirm their origin whenever possible. Managed the Mobile Device Management platform (Mobile Iron) to create secure profiles for personnel mobile devices in accordance with security metrics established by the company. Analyzed legacy software to write informational documents of their use and reinstallation procedures.

**UMECO INC, IT SYSTEMS ADMINISTRATOR/DIRECTOR**

Maintained the continuity of the service, confidentiality, integrity, and availability of the information systems at UMECO. Installed, configured, and trained on communicator systems for ALS patients to provide with capabilities communication. Responsible for network security, concentrating on network security design, in particular troubleshooting and debugging incidents related to network security. Developed and maintained the ERP system and a broad variety of other services. Developed the company's web presence through promoting social media services, informative website, web marketing and the online sales portal. Monitor the systems backup and recovery strategies under its charge and ensures they are being carried out accordingly. Created CRM campaigns by extracting SQL data from the ERP and exporting it thought lists to the sales and customer service teams allowing the boosts of sales.

## NELSON ALAMO DEL VALLE

### TOP QUALIFICATIONS

- Knowledge in Microsoft Office: Word, Excel, Power Point. Knowledge of SharePoint and applications Like QNXT, Vital Xpress, Call Copy, Essette, CCMS, Power MHS, Amazon Connect/Symbee.
- Capacity to make decisions.
- Easy to work as a team.
- Persistence and constancing to obtain results.
- Good communication capacity, both verbal and written.

### EDUCATION/CERTIFICATIONS

#### UNIVERSITY OF PUERTO RICO, CAYEY CAMPUS

- BBA WITH A CONCENTRATION IN MANAGEMENT.

### RELEVANT EXPERIENCE

#### TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, QUALITY SPECIALIST

Monitor call center agents verbal communications through live call monitoring and review of call recordings to ensure staff compliance with policies, procedures, and regulations. Monitors and train agents for adherence with policies, procedures, and best practices. Complete required monitoring documentation, such as the call monitoring scorecard, to capture successes and areas for improvement. Share these findings with other leadership and trend common errors. Provide feedback and coaching to agents to help staff achieve all department performance expectations. Document quality assurance findings on the department, team, topic, and individual level and communicate quality findings via reporting, including creating new reporting to best fit needs. Suggest improvements to call monitoring and quality assurance process, documentation, and reporting. Review work completed in the systems to ensure appropriate processes were followed and documentation is complete. Creation of presentations, job aids among others. Training of operational and quality aspects to regular and new staff. Moderator and participant in processes of internal and external calibrations with customers. Train the trainers: serve as support personnel to the human resources department for recruitment and training of personnel. Evaluate communications received from clients related to complaint resolution to ensure completeness, including providing suggestions for updates to internal policies and procedures. Call investigations related to complaints and staff performance. Assist in producing and evaluating customer surveys to enhance service delivery and improve member satisfaction. Identify areas for innovation and improvement and implement subsequent initiatives for the operation based on trends, issues, and questions from clients. Creation and management of monitoring and calibration sheets in Call Copy, Symbee and Excel applications.

#### TELEMEDIK AND TELEMEDIK INNOVA HEALTH SOLUTIONS, CUSTOMER SERVICE REPRESENTATIVE

Receive calls from beneficiaries and providers of medical plans including Medicare Advantage Plans, Part D Drug Plans, and the Government Health Plan through the telephone line in relation to billing status, authorization of medications and / or medical services, processes, referrals, and benefits. Screener for the Nurse Advise Line. Serve as support staff to shift leaders and supervisors observing and managing the call flow. Serve as support to the Human Resources Department for recruitment and training of personnel.



Attachment E. Mandatory Requirements

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

Contact Center Request for Proposals

2022-PRMP-MES-Contact Center-004

May 11, 2022

### 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.

**TeleMedik Response:** All our clients have access to our facilities and systems/data/documentation regarding their delegated services. The facilities, systems, data and documentations are available for audit and quality procedures according to our clients’ needs. Specific users/access could be provided as part of these requirements.

2. The vendor agrees to relinquish any published toll-free telephone numbers established for Medicaid support.

**TeleMedik Response:** TeleMedik agrees to relinquish any toll-free number (TFN) established for Medicaid support as part of the delegated services, including the administrative procedures with our vendors.

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

**TeleMedik Response:** TeleMedik will support PRMP in any activity related to the Contact Center (audits, investigations, legislative requests, etc.) and will work any request for information (RFI) within the due date established by PRMP. Our Governance Programs include resources and policies to ensure the availability, expertise and agility to analyze, investigate and provide the required support.

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.

**TeleMedik Response:** JAYE, Inc. DBA doesn't have any parent, affiliates or subsidiary organization as of today, May 11, 2022. This requirement is not applicable for us.

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.

**TeleMedik Response:** TeleMedik complies with state and federal requirements and standards, including U.S. Department of Health & Human Services, the Center of Medicare and Medicaid Services (CMS), and the Puerto Rico Health Department. As part of our operations, we monitor changes to regulation applicable to our business and/or the creation of new regulatory requirements in order to 1) analyze their operational or organizational impact, 2) mitigation any risk and 3) implement requirements within the established period. Our Internal policies establish the commitment to keep updated in the different laws and regulations through different sources (Board of Directors, Labor Laws, Compliance Committees, Conferences and education, Legal Counselor, our Compliance Colleagues, etc.)

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.

**TeleMedik Response:** We recognize that Section 508 is a federal requirement. In regard of that, our partner Amazon Web Services (AWS) will have Section 508 compliance needs. AWS is committed to complying with all relevant government standards and compliance controls. This commitment is reflected in the importance we place on understanding, implementing, and maintaining ongoing compliance with these standards for all individuals that access and consume our services.

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.

**TeleMedik Response:** TeleMedik is committed to assure accessibility to all our clients in an effective and timely fashion, and free from interruptions; available 24 hours a day, seven days a week or according to business needs. Our daily operation is monitored based on:

- Service Level (80% calls/chats answered in/or less than 30 seconds);
- Abandon Rate (5% or less)
- Blocked Rate (3% or less)
- Quality Assurance (90%, including first contact resolution),
- Voicemail/E-mail response (100% within 24 business hours),
- Call Recording (100% for 10 years)
- Disaster Recovery and Business Continuity Plan

Our daily operations are focused on adding value, satisfying our clients, and meeting their goals and challenges that arrive as part of our continuous growth. As a current vendor for many clients from this highly regulated Health Industry; our Corporate Compliance and Quality Programs defines and promotes

the continuous monitoring of key KPI's and SL performance Guarantees. Aggressive Corrective Action procedures are in place to ensure proactive and agile response to missed goals due to changes on patterns and trends.

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)

**TeleMedik Response:** TeleMedik has established a policy on the consumption of Tobacco, Drugs and Alcohol, to preserve and improve the well-being of the people who are part of its team. We promote healthy lifestyles so that our employees maintain a good quality of life, proper performance, and competitiveness of the Organization. Our Policy ADM CORP 036 - *Free Tobacco, Alcohol and Drugs Environment* is included as an appendix to this proposal (Appendix H).

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.

**TeleMedik Response:** TeleMedik complies with federal Executive Order 11246 related to Equal Employment Opportunity Act. TeleMedik does not discriminate in hiring or employment because of race, color, age, sex, marriage, gender identity, sexual orientation, physical or mental disability, marital or parental status, social or national origin, social conditions, political affiliations, religious, political or gender ideas, sexual assault or stalking, for being in the military, ex-military, serving or having served in the United States Armed Forces or for holding veteran status or any other protected status. This Policy includes, but is not limited to, all decisions made on promotions, transfers, demotions, reductions in force, discipline, recruiting, compensation, benefits, training, education, or any other terms or conditions of employment. We will endeavor to concentrate on the disabled person's abilities and not disabilities. This policy has the support of the highest levels of management. Also, as private healthcare company, our building and operation complies with any applicable requirement regarding of the Clean Air Act and the Clean Water Act. Our Policy ADM CORP 0 10 - *Equal Employment Opportunity* is included as an appendix to this proposal (Appendix G).

10. The vendor must establish and maintain the contact center in Puerto Rico.

**TeleMedik Response:** TeleMedik is established in Puerto Rico from 1996. Our Contact Centers are located in Guaynabo, P.R. and Mayaguez, P.R.

- Service centers are physically accessible and in stand-alone buildings.
- 27,000 sq2 for future expansion in front of the 9-1-1 building which ensures rapid response and resolution in Guaynabo
- 12,000 sq2 in Mayaguez for redundancy and business continuity
- Systems and Internet Redundancy for ensuring continuity of services at two sites
- Proven Disaster Recovery and Business Continuity Plans
- Technical support available 24x7
- Electric generators in both facilities with redundancy

11. The vendor must serve as a trusted partner to PRMP and represent PRMP's interests in all activities performed under the resulting contract.

**TeleMedik Response:** TeleMedik will serve as a trusted partner to, PRMP and will represent PRMP's interests in all activities performed under the resulting contract. TeleMedik recognizes the challenges and needs of our clients and is sensible to different and unique approaches to promotes engagement and compliance within the industry. Our experience and professional resources are ready to support your strategies to reach your most valuable customers. Our infrastructure, capabilities, and continuous availability (24x7) to fit your needs; are only some of the added values of our partnership. We want to support your goals; with a customize model that fits and integrates your needs. According to your target and goals, we will support in developing a unique outreach approach to serve your needs and 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

**TeleMedik Response:** TeleMedik will, at minimum, include the standard invoice package content for PRMP as described in the RFP. For reference, a template of the invoice is included as appendix of this proposal.

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.

**TeleMedik Response:** To ensure that the clients we serve have the adequate staff, a forecast is worked on a monthly basis by our Business Analyst taking in consideration standard variables and formulas. In the event a requirement, timeline, quality, or other standards are not being met, TeleMedik will establish an internal corrective action plan (CAP) to meet the service level defined in contract. TeleMedik is committed to increase staffing levels and/or to implement any other necessary measure to comply with contractual requirements. Our policy ADM COMP 005 defines the strategies and principles that guide the monitoring

Puerto Rico Medicaid Program Contact Center Request for Proposals  
Technical Proposal – Attachment E

and auditing of the departments' operational performance to ensure that TeleMedik meets regulatory and contractual requirements.

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.

**TeleMedik Response:** We agree that 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.

**TeleMedik Response:** TeleMedik will recruit only professionals that meet all standards established by applicable state and federal laws and regulations, including not being part of the Exclusions Lists OIG and GSA. Also, the staff will comply with their onboarding trainings (regulatory and operational) prior to executing work for the contract. These requirements are audited internally on a frequently basis.

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

**TeleMedik Response:** TeleMedik will ensure that everyone who accesses sensitive information, such as PHI, PII, FTI, SSA and/or other confidential information be granted some form of unique user identification, such as a login ID. TeleMedik will create and maintain access control lists (ACLs) and other controls-related capabilities to ensure that access is limited to approve rights and that our staff doesn't have the capability to access, edit, and share personal information data with unauthorized persons. Each TeleMedik employee is trained upon hiring and thereafter annually about this requirements and the importance of protecting personal information during our daily operational activities.

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.

JAYÉ Inc. d/b/a TeleMedik

(Company)

Joaquin Fernandez President

(Representative Name, Title)

787-474-7670

(Contact Phone/Fax Number)

05-11-2022

(Date)

Attachment F. Requirements Traceability Matrix

Requirements Traceability Matrix is a Microsoft Excel spreadsheet that details the items PRMP has identified as integral toward the delivery of services

Contact Center Request for Proposals

2022-PRMP-MES-Contact Center-004

May 11, 2022

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
<b>Req. #</b>	The unique identification number assigned to each requirement or service level agreement (SLA) DO NOT EDIT THIS FIELD.
<b>Requirement Description</b>	The detailed description of the requirement or SLA. DO NOT EDIT THIS FIELD.
<b>Requirement Met</b>	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
<b>Vendor Proposed Response</b>	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.
<b>Clarifying Comments*</b>	If the Response Met is set to "Clarification", the vendor must provide clarifying comments
<b>Proposed Liquidated Damages Amount**</b>	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



REQ #	Requirement Description	Requirement Met	Vendor Response	
			Vendor Proposed Response	Clarifying Comments
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	We have state-of-the-art technology in our contact center. We have omnichannel capability powered by AWS.	
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	We have contact center omnichannel capability powered by AWS.	
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.	Yes	We have Advanced IVR routing capacity	
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	The ACD system is part of our existing operations	
A.5	The contractor must supply all equipment (e.g., computers, monitors, ACD System, IVR/telephones, headphones, chat application, TTY, etc.) necessary to provide services as detailed in the contract.	Yes	TeleMedik will provide computers, monitors, the ACD System, IVR, telephones, and headphones. Chat and TTY is part of our existing operations	
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	The escalation process will be implemented according to PRMP requirements, policies and procedures	
A.7	The contractor must be able to send automated reminders (e.g., appointment date and time).	Yes	TeleMedik has a robust contact center technology that can be integrated with other systems. We must understand PRMP system/app in order to define the outreach campaign strategies for automated	
A.8	The contractor is responsible for initial configuration of computers, hosting the platform, and providing technical support for the contact center operations.	Yes	This is part of our existing operations	
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	We have a dialer for outbound campaigns (messages and calls). We can run blast messages and preview / progressive campaigns	
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	As part of our omnichannel technology we have a text messaging app.	
A.12	The contact center staff must be able to access the PRMP PEP via the web via Virtual Private Network (VPN).	Yes	We can comply with this requirement	
A.13	The contact center staff must be able to access the PRMP Call Center management System (CCMS) via VPN.	Yes	We can comply with this requirement	
A.14	The contact center staff must be able to access PRMMIS via VPN.	Yes	We can comply with this requirement	
A.15	The contact center staff must be able to access MEDITIG3 via VPN.	Yes	We can comply with this requirement	
A.16	The contact center staff must be able to access LMS via the internet.	Yes	We can comply with this requirement	
A.17	The contact center staff must be able to access email.	Yes	We can comply with this requirement	
A.18	The contractor must be able to send automated reminders (e.g., appointment date and time).	Yes	TeleMedik has a robust contact center technology that can be integrated with other systems. We must understand PRMP system/app in order to define the outreach campaign strategies for automated	
A.11	The contractor must establish and maintain a Disaster Recovery Plan.	Yes	As part of our Internal protocols a robust DRP is reviewed in a annual basis and available upon	
A.19	The contractor must conduct a full disaster recovery test at least once a year and report the results to PRMP.	Yes	We run tests periodically and will share the results with PRMP	

REQ #	Requirement Description	Requirement Met	Vendor Response	
			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	TeleMedik contact center operations are in PR. We have one center located in Guaynabo and the other one is in Mayaguez.	
B.2	The contractor must provide a fully operational contact center with all services no later than July 31, 2022.	Yes	TeleMedik agrees to be ready to serve Medicaid Members and Providers by July 31, 2022.	
B.3	Contact center staff must be fluent in Spanish and proficient in English.	Yes	The CSR's assign to the account will be bilingual.	
B.4	Contact center agents must be able to handle inquiries in both Spanish and English.	Yes	Agents are going to be ready to handle all type of calls and inquiries covered in the training.	
B.5	The contractor's contact center operations must be physically separated from the contractor's other clients/accounts.	Yes	We have a close area with a security entrance that can be assign to the account staff.	
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	The Medicaid account staff will be dedicated staff and will not be share with any other account.	
B.7	The contractor must provide space, computer, and phone systems within the contractor's facilities for one Medicaid representative. Advanced notice of arrival will be provided by PRMP.	Yes	The Medicaid representative will be more than welcome in our facilities and will have a designated space available.	
B.8	The contractor will provide access to PRMP to listen to calls remotely.	Yes	Telemedik will provide the access to listen calls and will train PRMP staff on how to use the tool.	
B.9	Contact center employees must have Puerto Rico Negative Criminal Record certificate and be screened through the OIG exclusion lists.	Yes	As part of our standard procedure with all contracted employee we screen them through OIG exclusion list and the Puerto Rico exclusion list.	
B.10	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	Telemedik is available and capable to adapt our business schedules base on our clients need and to cover holidays and special days or hours when necessary.	
B.11	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	Our telephone system have the capacity to offer messages when the contact center is close after business hours, holidays, emergency events and any other extraordinary event. The system can provide voice mail capacity to be handle the next working day.	
B.12	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	We agree on Keeping PRMP aware of any event that might affect the operations and provide an estimated time to recover normal operations. As part of our recovery plan we analyze the root cause and prepare a CAP that will provide the specific action items to solve the unexpected event.	
B.13	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	In our staffing formula we consider a shrinkage of 24 % and also the turnover % is part of the exercise as well as a risk index to ensure that the hired staff will cover the call traffic demand, chats demand and special events.	
B.14	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	In our operations model we have a percentage of staff in premises and that includes having staff available in both of our center for business continuity purposes and a small percentage working remotely for the same purposes.	
B.15	The contractor must have internal controls, policies, and procedures in place in compliance with Medicaid policies and procedures.	Yes	TeleMedik has in place controls, policies, and procedures that comply with Medicaid policies. The market we serve is highly regulated therefore we comply with federal and state regulations.	
B.16	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	All policies and procedures are in hard copy and in electronic format.	
B.17	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	TeleMedik has a facility security plan, policies and procedures align to protect the confidentiality of Medicaid information.	
B.18	The contractor must log all calls.	Yes	Calls traffic metrics are measured on intervals, daily, weekly, monthly and any accumulative means. The metrics include Offered calls(received), abandoned calls and ACD calls (handled calls) among other indicator that reflects the agent's performance and the service levels agreements.	
B.19	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	In the documentation requirements we can include all interactions with Providers and Members. If a separate log for e-mails is necessary, we have a SharePoint app to create logs with report capacity to share daily with PRMP.	
B.20	Contact center agents will respond to email messages, voicemails, and chats, as defined in the service level agreements outlined in the contract.	Yes	Our contact center has omnichannel technology therefore our agents have the ability to handle interactions through different communication channels such as voicemails, emails and chats while maintaining the agreed service levels.	
B.21	The contractor will track the number of cases referred to a PRMP case worker/specialist.	Yes	Telemedik can create a referral log for monitoring purposes and also to take the necessary actions in case is not being handle adequately.	

B 22	The contractor must immediately report to PRMP any personal health information (PHI) breach or HIPAA violation within 24 hours of the incident.	Yes	Our Compliance department runs several internal audits in the contact center to ensure that all internal and client's requirements are being fulfilled. In addition, all TeleMedik employees are required to take trainings related to HIPAA, Waste, Fraud and Abuse twice a year. A clear communication and reporting policy is in place for referrals.	
B 23	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	TeleMedik approach to manage Call Center Implementations y clearly defined and our commitment to transition any service will be seamlessly to service users.	

REQ #	Requirement Description	Requirement Met	Vendor Response	
			Vendor Proposed Response	Clarifying Comments
C.1	The contractor will report the maximum occupancy rate of agents.	Yes	Occupancy is one of several KPI's that we currently measured in a regular basis.	
C.2	The contractor will report on contact center operational activities and performance metrics including those stated in the SLAs. Reports may include, but will not be limited to:	Yes	All the indicators required in this RFP can be provided in a customized template.	
C.2a	Total number of inquiries by type	Yes	We can provide reports with total inquiries by category (according to skills defined as for example members vs providers. If Telemedik is provided with PRMP access to reports, a detailed kind of report could be handled )	
C.2b	Total number of calls by type	Yes	We provide reports with total calls divided by category	
C.2c	Average call abandonment rate	Yes	We provide reports with % of abandoned calls	
C.2d	Average time calls or chats are in queue (wait time)	Yes	We provide reports with average waiting time	
C.2e	Percentage of calls that were blocked or received a busy tone	Yes	We provide reports with total calls that could not connect.	
C.2f	Average handle time for calls, chats, or emails	Yes	We provide AHT for calls, emails, and chats.	
C.2g	Number of cases referred to a PRMP case worker/specialist and what percentage of the total call volume represent transferred calls	Yes	We can provide total cases referred to PRMP and % of calls transferred.	
C.2h	Quality results of monitored calls	Yes	We provide metrics with quality results (call monitoring) by agents and cumulative by team.	
C.2.i	Average time it took to acknowledge, respond, and complete email inquiries	Yes	We can also provide email handling time	
C.2.j	First contact resolution (FCR) by agent for calls and chats, defined as the percentage of inquiries the agent can address without transferring, escalating, or returning the call or chat	Yes	We can provide FCR metrics on calls and chats.	

REQ #	Requirement Description	Requirement Met	Vendor Response	
			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	Yes	We can comply with this requirement. This is part of our existing processes	
D.2	The contact center ACD will use pre-approved scripts to ensure quality delivery of services.	Yes	Scripts will be reviewed and approved by PRMP and implemented by TeleMedik	
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	We have a robust training structure. We will follow the training material and guidelines provided by PRMP.	
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	As part of our technology, we have a quality tool used for monitoring and scoring the quality of the calls	
D.5	The contractor must follow the quality measures for completeness of records, as established by PRMP.	Yes	TeleMedik will fully adopt PRMP quality measures	
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	Our Compliance department ensures that all requirements are being met. In addition, all TeleMedik employees are required to take trainings related to HIPAA, Waste, Fraud and Abuse twice a year. New hires according to regulations and Onboarding.	
D.7	The contractor will develop and submit a corrective action for sub-par performance identified in the prior month.	Yes	We will comply with this requirement. This is part of our existing processes / operations	

REQ #	Requirement Description	LD#	Liquidated Damages for Non-Compliance	Vendor Response	
				Requirement Met	Vendor Proposed Response
E.1	The service level (average wait time, prior to the call being answered by an agent) must be less than 30 seconds for 80% of calls received	LD.1	One percent (1%) of the monthly invoice amount for each percent below eighty percent (80%) of calls received, but not to exceed five percent (5%) of the monthly invoice	Yes	Yes
E.2	Abandon rate for calls must be 5% or less	LD.2	One percent (1%) of the monthly invoice amount for each percent that exceeds five percent (5%) per month, but not to exceed five percent (5%) of the monthly invoice	Yes	Yes
E.3	First Contact Resolution must be at least 70% for all calls and chats received from providers and beneficiaries	LD.3	One percent (1%) of the monthly invoice amount for rates below seventy percent (70%) per month, for each percent below seventy percent 70% of calls received, but not to exceed five percent (5%) of the monthly invoice amount.	Yes	yes
E.4	All email inquiries must be acknowledged (including statement of the problem, ticket number, and acknowledgement of receipt) within 2 business days	LD.4	A per instance fee of fifty dollars (\$50) will be assessed.	Yes	yes
E.5	All email inquiries received must be responded (including assigned agent, ticket number, and link to ticket details) to within 5 business days	LD.5	A per instance fee of fifty dollars (\$50) will be assessed.	Yes	yes
E.6	80% of chats received must be responded to by an agent in less than 30 seconds	LD.6	One percent (1%) of the monthly invoice amount for each percent below eighty percent (80%) of calls received, but not to exceed five percent (5%) of the monthly invoice	Yes	yes
E.7	Calls must have a quality score of 90% or higher (PRMP may evaluate a minimum of 5 calls per agent per month)	LD.7	One percent (1%) of the monthly invoice amount for rates below ninety percent (90%) per month.	Yes	Yes
E.8	All incoming and outgoing calls will be recorded, retained, or made available (within 5 business days) for quality assurance purposes	LD.8	A per instance fee of two-hundred (\$200), up to a maximum of twenty thousand (\$20,000) per day, will be assessed.	Yes	Yes

Attachment G. Response to Statement of Work

This section provide instructions to vendors to respond to the requested services detailed in this RFP

Contact Center Request for Proposals  
2022-PRMP-MES-Contact Center-004  
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### G.1 Approach to Systems and Technology

The systems and technology structure focus on providing innovation, agility, and simplicity to our core processes. Innovation through business solutions to respond to our clients challenging needs, agility to meet service and regulatory requirements in a fast but effective implementation cycle and simplicity for the people; to ensure a unique service experience. TeleMedik infrastructure adapts to manage multiples scenarios considering inbound, outbound, blended campaigns, predictive dialing, multichannel options, etc.

Our telecommunications, internet and network providers maintain exceptional response standards for multiple reasons, redundancy requirements, high availability, and service volumes. TeleMedik has a voice and data system with redundancy and high data availability between Guaynabo and Mayagüez. Also, effective backup and archiving policies and procedures for protected health information and digital assets of the organization are in place to comply with our clients' requirement (10 years).

The Disaster Recovery and Business Continuity Plan ensures availability, and easy recovery from non-expected events. Our experience has demonstrated our capacity to recover and provide support to our clients under difficult challenges. A technical support staff is available to support 24x7. The physical infrastructure provides unique accessibility and availability for our clients.

- 2 Contact Center facilities located in key strategic areas of Puerto Rico
  - Service centers are physically accessible and in stand-alone buildings.
  - 27,000 sq2 for future expansion in front of the 9-1-1 building which ensures rapid response and resolution in Guaynabo
  - 12,000 sq2 in Mayaguez for redundancy and business continuity
- Over 400 seats with capacity to add more workstations in both locations
- Electric generators in both facilities with redundancy
- Proven Disaster Recovery and Business Continuity Plans
- Systems and Internet Redundancy for ensuring continuity of services at two sites
- TeleMedik Omnichannel Contact Center its 100% cloud-based running on Amazon Web Services (AWS), one of the most scalable, secure, and reliable clouds on the world.
  - Other companies from the Healthcare industry using AWS solutions are Baxter, Anthem, Merck, Philips, and AstraZeneca.

Technical audits and surveillance processes are in place to protect our communication ports and data management controls (vulnerability and penetration test, constant monitoring, etc.).

Our Facilities:



*Illustration 1 - Mayaguez Facility*



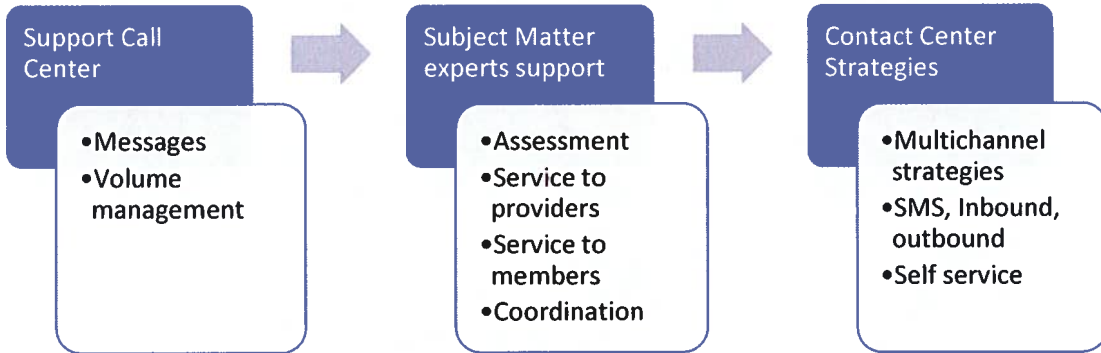
Puerto Rico Medicaid Program Contact Center Request for Proposals  
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*Illustration II - Guaynabo Facility*

**G.2 Approach to Operations**

TeleMedik has implemented and demonstrated a consistent pace of growth at our local market. Following we share a timeline that shows our transition in phases from a traditional call center to a telehealth provider / omnichannel health Contact Center (key growth events):



Areas of expertise: Healthcare Customer Services for members and providers, Telephone Triage Services, Health Education Services, Telemedicine, Help Desk, Personal Emergency Response Services, Service Coordination, and Pharmacy Services.

Transition from a traditional service to new innovative technologies:



Illustration III - TeleMedik Contact Center Evolution

The Health Call Center started on 1996 handling inbound calls and transferring calls out in case an external support was required. A communications PBX was used as the main switch to receive and make out calls but with limited flexibility. Since the beginning TeleMedik uses the technology available to serve our clients through voice and mass mailings. In 2011 TeleMedik invested in advance technology to move from an analog to digital capabilities. The innovative technology allowed us to add IVR's, SMS, fax integration reducing cost but giving us the opportunity to add capacity to serve our customer needs. Also, it allows our people to focus on the inquiries and needs of our clients and providers in the market of Puerto Rico. Some inquiries include the following: eligibility, general information, benefits, access to self-service portals, questions about mailing material, fraud referrals, among others.

Recently, since 2020, TMK moved to a cloud solution, opening our doors to an omnichannel world that combines multiple features or services with the user opportunity to move between different service media. TeleMedik Omnichannel brings the chance to understand better your affiliates through the data connections that can be made while feeding the artificial intelligence. Trends regarding utilization and behavior patterns can be identified for a personalized service orientation. The Omnichannel Model capabilities increases the self-service option with more channels as SMS, Chat, E-mails, Social Media and unlimited concurrent calls. TeleMedik Contact Center options provide flexibility to integrate with external systems, availability to import and export contacts and data, report interactions statistics about media connections to agents in premises and working at home. The new technology facilities expansion capabilities and office relocations.

Image:

### TeleMedik Omnichannel Contact Center Capabilities

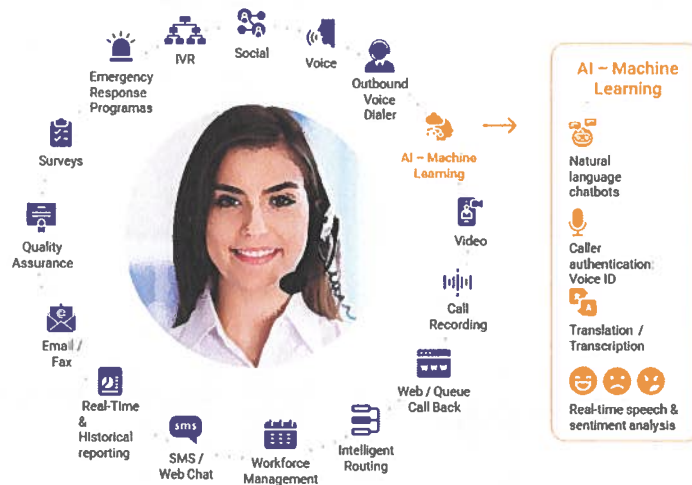


Illustration IV - TeleMedik Omnichannel Contact Center Capabilities

Artificial Intelligence that comes from the Omnichannel data bases will allow us to support your Quality standards and exceed expectations with sentiment analysis. Also, natural bots and chatbots can offer affiliates the alternative for auto service with the capacity to interact; offering options that best fit their needs. Each option can be customized and implemented in collaboration with your expert staff and focus on the affiliates most frequent service requests.

We are able to support our client to automate and simplify customer access to services generally required in a frequent basis. The top five -ten top inquiries are opportunities to enhance the customer experience, by providing options for self-service determinations or considering individual preferences and capabilities. We have identified as a preliminary work that the following inquiries could be programmed for self-service as an option additionally to the Omnichannel that we offer: 1) Application Process Orientation 2) Eligibility 3) COB Eligibility 4) Demographic Updates 5) Providers Register 5) Recertification Process Requirements 5) Customer Satisfaction Surveys

Puerto Rico Medicaid Program Contact Center Request for Proposals  
 Technical Proposal – Attachment G

**G.3 Approach to Reporting**

TeleMedik processes and guidelines are defined to meet the general performance standards in the health and contact center industry and specifically the reporting guidelines described on the Medicaid and Medicare standards for inbound and outbound services. Our reporting solution allows us to create a call center agility, optimize the operation with real-time data, and track agents' productivity across multiple platforms.

**Business Data Analysts and Reporting Services** intervenes in the analysis phase, planning and forecasting process, and keep supporting the Centers with reporting and analysis for early decisions making and proactive movements. **TeleMedik reports** are shared with the client and contain the information that best reflect the service provided. In-house programming resources create the flexibility to change, add or modify according to the specific requirements and needs of the client. Also, we use call center metrics dashboards to compile real-time data in one centralized location, creating a more efficient and effective contact center experience.

Following some examples of reports that will be available upon request.

*Illustration V - Contact Center Reports Examples*

1.1 - TMK Contact Center Performance Report

Report Criteria:  
 Start: Apr 27, 2021 12:00:00 AM Atlantic Standard Time  
 End: Apr 27, 2021 11:50:00 PM Atlantic Standard Time  
 Agent group: Orientation Group  
 Agent State: After Call Work, Login, Not Ready, On Call, On Voicemail, Ready, Ringing  
 Long Calls: 600  
 Short Calls: 10  
 Long Parks: 300  
 Long Holds: 300  
 Long After Call Work: 600  
 Short After Call Work: 0

AGENT	DATE	LOGIN TIME	NOT READY TIME (%row)	UTILIZATION (LOGIN LESS WAIT AND NOT READY)	UTILIZATION (LOGIN LESS WAIT AND NOT READY) (%row)	ON CALL TIME (%row)	Average PREVIEW TIME	PREVIEW TIME (%row)	Average HOLD TIME	Average HANDLE TIME	Average AFTER CALL WORK TIME	CALLS count
adiacels pena	2021/04/27	07:25:13	1.08%	07:19:33	98.73%	0.39%	00:00:14	4.90%	00:00:00	00:00:28	00:00:16	93
jose zylala	2021/04/27	08:28:43	11.82%	07:28:05	88.03%	33.15%	00:00:15	4.29%	00:00:00	00:01:56	00:00:20	87
joseph casillas	2021/04/27	07:31:29	0.95%	06:59:47	92.86%	7.13%	00:00:14	2.10%	00:00:00	00:01:35	00:01:12	41
juliana delmoral	2021/04/27	08:34:51	13.43%	07:24:04	96.32%	71.23%	00:00:15	7.43%	00:00:04	00:02:07	00:00:07	153
luis hernandez	2021/04/27	08:53:01	17.94%	07:16:30	81.91%	55.00%	00:00:15	4.29%	00:00:00	00:03:56	00:01:05	93
luis core	2021/04/27	07:50:08	8.80%	07:16:58	92.95%	31.45%	00:00:15	4.38%	00:00:00	00:01:35	00:00:14	82
lyris cortesi	2021/04/27	08:19:55	7.37%	07:42:25	92.50%	24.85%	00:00:10	5.16%	00:00:00	00:01:17	00:00:09	83
marcos beyl	2021/04/27	07:58:35	7.71%	07:21:58	92.18%	22.50%	00:00:14	4.22%	00:00:00	00:01:15	00:00:22	92
yadiel rrmquez	2021/04/27	03:16:40	1.60%	03:13:27	95.36%	3.65%	00:00:11	0.84%	00:00:00	00:01:06	00:00:43	10
yaminar azula	2021/04/27	08:18:50	12.53%	07:15:33	87.31%	51.78%	00:00:15	4.01%	00:00:00	00:03:47	00:00:57	80
yolimar lopez	2021/04/27	08:54:07	17.44%	07:20:07	82.40%	46.98%	00:00:15	4.59%	00:00:00	00:02:58	00:00:47	98
		1:52:53.2		76:36:53			Avg: 00:00:15		Avg: 00:00:01	Avg: 00:02:37	Avg: 00:00:23	912

1.1 - TMK Contact Center Performance Report

Report Criteria:  
 Start: Apr 1, 2021 12:00:00 AM Atlantic Standard Time  
 End: Apr 30, 2021 11:59:00 PM Atlantic Standard Time  
 Agent group: Orientation Group  
 Agent State: After Call Work, Login, Not Ready, On Call, On Voicemail, Ready, Ringing  
 Long Calls: 600  
 Short Calls: 10  
 Long Parks: 300  
 Long Holds: 300  
 Long After Call Work: 600  
 Short After Call Work: 0

LOGIN TIME	NOT READY TIME (%row)	UTILIZATION (LOGIN LESS WAIT AND NOT READY)	UTILIZATION (LOGIN LESS WAIT AND NOT READY) (%row)	ON CALL TIME (%row)	Average PREVIEW TIME	PREVIEW TIME (%row)	Average HOLD TIME	Average HANDLE TIME	Average AFTER CALL WORK TIME	CALLS count
1592:49:02	15.08%	1349:59:28	84.75%	40.46%	00:00:15	4.71%	00:00:00	00:02:23	00:00:36	17656
1592:49:02		1349:59:28			Avg: 00:00:15		Avg: 00:00:00	Avg: 00:02:23	Avg: 00:00:36	17656

Puerto Rico Medicaid Program Contact Center Request for Proposals  
 Technical Proposal – Attachment G

MTD Summary Report																
4/1/2020 - 6/30/2020 CLIENT A																
Split/Skill	Inbound Calls	ACD Calls	Aban Calls	Avg Speed Ans	Avg Aban Time	Avg ACD Time	Avg ACW Time	Max Delay	%ACD Time	% Ans Calls	Calls Per Pos	Avg Hold Time	% Within Service	% Aban Calls	Agents Shifted	Avg Handled Time
Queue A	18879	17850	1029	00:49	04:26	07:47	00:09	42:24	15%	95%	1143	02:52	80%	5%	42	00:00
Queue B	8105	7748	357	00:29	03:00	09:02	00:09	40:28	7%	98%	481	01:51	80%	4%	46	00:45
Queue C	15715	15094	631	00:27	02:31	08:41	00:09	38:10	14%	98%	933	01:51	81%	4%	46	00:25
Queue D	22010	21171	839	00:29	02:58	08:43	00:10	40:56	19%	98%	1310	01:53	80%	4%	46	00:30
Queue E	25	24	1	00:42	00:01	11:06	00:07	04:30	0%	98%	1	02:29	75%	4%	46	12:29
Queue F	147	140	7	00:41	02:44	07:07	00:12	07:58	0%	95%	9	02:52	79%	5%	46	00:43
Queue G	215	208	7	00:30	03:15	07:04	00:09	08:00	0%	97%	13	03:31	83%	3%	46	00:22
Queue H	487	458	11	00:31	02:20	06:27	00:07	09:06	0%	98%	29	02:55	83%	2%	42	00:29
Queue I	1335	1282	53	00:30	05:31	10:02	00:10	12:42	1%	98%	81	02:37	80%	4%	45	11:14
Queue J	1871	1824	47	00:28	06:34	10:16	00:10	16:56	2%	97%	115	03:02	82%	3%	45	11:53
Queue K	41	41	0	00:32	00:00	07:40	00:06	12:35	0%	100%	3	03:16	80%	0%	45	00:56
Queue L	20	19	1	00:17	00:05	06:18	00:08	02:07	0%	95%	1	03:18	79%	5%	45	00:13
Queue M	394	344	50	00:14	01:11	01:05	00:00	31:08	1%	87%	369	00:00	99%	13%	2	01:05
Consolidado	60224	60191	3033	00:34	03:27	08:30	00:09	16:56	5%	96%	4385	02:17	81%	4%		00:28

#### G.4 Approach to Quality and Training

##### Quality Program

Our Corporate Quality Improvement Committees oversee all the company activities to ensure the accomplishment of the established policies, guidelines, protocols, client requirements, regulatory agencies and URAC standards for the Health Contact Center. Our efforts are guided to promote the best quality of service and excellence in health-related services. We develop standards that consider key principles defined for compliance and regulatory requirements to meet and ensure the best alignment between quality initiatives, compliance requirements and efficiency levels. It is our objective to identify areas of conflicts, inefficiency or improvement gaps and possible risk issues by using specific tools developed for these tasks. The Committees plan, execute, review expected results and implement necessary changes to improve continuously. Even when each group may have individual charters all of them will ensure the following objectives are met establishing a complete and central mechanism which coordinates the required activities to ensure the highest service quality standards based on 5 elements: **Customer Experience, High Quality, Efficiency, Innovation and Continuous Improvement, and Training and Development.** That quality management system is the core of our achievements as delegated entity, our results in operational and regulatory audits and the trust of our partners. As part of our Continuous Quality Improvement Program, we perform the monitoring of telephone calls and contact interventions through a complete and central mechanism which coordinates the required activities to ensure an experience and service of high quality. It also provides a planned and systematic process of observations, collections, evaluation of data, discussion and feedback to employees directed by specialized and dedicated Quality Agents.

##### Training Philosophy

TeleMedik's training policy defines our philosophy of learning and development aimed at the continuous improvement of skills, knowledge, abilities, and attitudes of our resources. This philosophy is structured in the stages of analysis, design, development, implementation, and continuous evaluation of our learning processes. In this way we promote the development in phases, from the core organizational aspects to those functional aspects tied to the role and individual contribution.

All our employees take an OnBoarding Training following an agenda that addresses multiple learning methodologies including, but not limited to in-person, online, practical training that allows exposure to the function to be exercised. The OnBoarding period will depend on an agenda of development activities, established in accordance with our client requirements. Also, additional trainings are offered periodically as a review or to attend updates. In regard of compliance matters, our Training and Compliance Departments ensures that all regulatory requirements are met. As part of our Regulatory Training Program, all TeleMedik employees are required to take trainings related to HIPAA, FWA, Compliance Program, Cultural Competence, among others, within 90 days after recruited, and therefore on a annual basis.

## TeleMedik Contact Center Pillars

**First call resolution:**

- Listen
- Evaluate
- Investigate
- Guide / Educate
- Take appropriate action

**Courtesy and concern:**

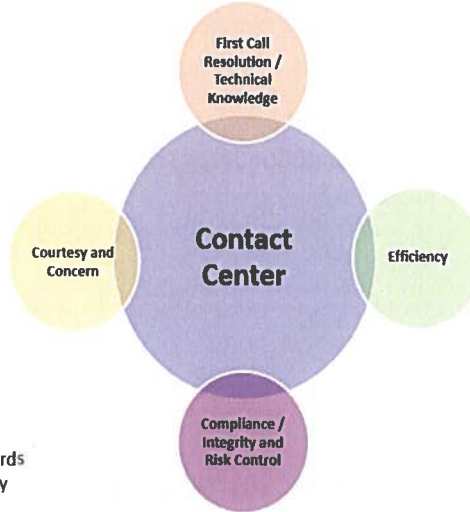
- Follow scripts
- Empathy
- Cultural sensitivity
- Kindness

**Compliance:**

- Regulations
- Policies
- Procedures
- KPIs

**Efficiency:**

- Results oriented
- High productivity
- High quality standards
- Advance technology



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.

Contact Center Request for Proposals

2022-PRMP-MES-Contact Center-004

May 11, 2022



**Attachment H: Terms and Condition 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.**


Joaquín Fernández  05-11-2022  
a. Printed Name / Signature of Authorized Personnel 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.**

Joaquín Fernández  05-11-2022  
Printed Name / Signature of Authorized Personnel 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.

Joaquín Fernández  05-11-2022  
Printed Name / Signature of Authorized Personnel 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.**

Joaquín Fernández  05-11-2022  
Printed Name / Signature of Authorized Personnel 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.

N/A

### 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 – N/A

**Puerto Rico Medicaid Program Contact Center Request for Proposals  
Technical Proposal – Attachment H**

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Alternative Language (If Applicable) Cross-Reference To Specific Section Of Vendor's Terms, If Any Provided As Part Of The RFP Response	Proposed Language (If Applicable) 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 – N/A**

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

APPENDIXES

This section will provide instructions to vendors to submit their approach to staffing the contact center using Attachment D: Vendor Organization and Staffing

Contact Center Request for Proposals  
2022-PRMP-MES-Contact Center-004  
May 11, 2022



Miramar Plaza Suite 501  
954 Ponce de León Ave.  
San Juan, PR 00907

PO Box 364908  
San Juan, PR 00936-4908

Tel: 787-622-2323  
Direct: 787-224-8884

e-mail: [cmuniz@cmc-law.com](mailto:cmuniz@cmc-law.com)

May 10<sup>th</sup>, 2022

Department of Health  
Government of Puerto Rico  
Medicaid Program

Re: Certification related to absence of lobbying activity.

To whom it may concern:

Based on the representations of JAYE INC., d/b/a TELEMEDIK's management and to my knowledge the aforementioned company has not engaged in any lobbying activities regarding the request for proposal that it is submitting concurrently with this certification nor has any of its subsidiaries engaged in any such practice.

Feel free to contact me with any questions or comments regarding the foregoing.

Regards,

A handwritten signature in black ink, appearing to read 'CMC' or similar initials, written in a cursive style.

Carlos Muñiz Cotté Esq. CPA.  
Counsel to Jaye Inc.



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

## CERTIFICADO ÚNICO DE PROVEEDORES

**FECHA DE EXPEDICIÓN**

9 de agosto de 2021

**NÚMERO DE CERTIFICACIÓN**

202101035

**FECHA DE VENCIMIENTO**

9 de agosto de 2022

**Nombre:** Jaye, Inc.

**Número de Proveedor:** 3289

**Dirección Postal:** URB CROWN HILLS PMB 347 AVE WINSTON CHURCHILL 138, San Juan, PR, 00926

**Teléfono:** (787) 999-6200

**Correo Electrónico:** arelis.gonzalez@telemedik.com

PERSONAS AUTORIZADAS A FIRMAR	
NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
Joaquin Fernandez	Authorized Signature

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del proveedor antes de adjudicar cualquier procedimiento de adquisición, órdenes de compra u otorgar contratos. Así como el de garantizar que el proveedor 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://serviciosonline.gobierno.pr/validaciónelectrónica/>, debe usar el número de certificado como código de validación

February 27, 2019

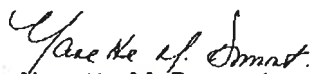
Who might be interested:

We confirm that Triple-S Salud maintains a business relationship with JAYE, Inc. DBA TeleMedik, for the past seven years. Telemedik is serving as a delegated entity to our Government Health Plan call center services.

Telemedik has a team of approximately 90 agents currently serving over 60K calls monthly for the inbound call center under the policies and standards established by us and the regulator. Telemedik has the ability to perform the services required and are available and responsive to our needs during the engagement. I have had a good experience over the past few years for the services they have rendered to us. I therefore recommend their call center services.

Should you required more information, please feel free to contact me at 787-749-4027.

Respectfully,



Nanette M. Dumont  
Service Management VP  
PO Box 363628  
San Juan, PR 00936-3628  
ndumont@ssspr.com





FEBRUARY 27, 2019

To who it may concern:

We confirm that MMM Holdings, LLC maintains a business relationship with JAYE, Inc. DBA TeleMedik, for the past 13 years. Serving as a delegated entity to many of our services and complying with the performance, quality and regulatory aspects that we demand in our contract. We assure that an open and constant communication is sustained for all business topics.

Respectfully,

A handwritten signature in blue ink, appearing to read "Orlando González".

Orlando González, Esq. CPA

President



**GOBIERNO DE PUERTO RICO**  
**Departamento de la Familia**  
Administración de Familias y Niños

February 27, 2019

Who might be interested:

We confirm that Department of Family, maintains a business relationship with JAYE, Inc. DBA TeleMedik, for the past 5 months. Serving as a delegated entity to our services and complying with the performance, quality and regulatory aspects that we demand in our contract. We assure that an open and constant communication is sustained for all business topics.

Respectfully,

A handwritten signature in blue ink, appearing to read "Glenda L. Gerena Ríos", written over a horizontal line.

Glenda L. Gerena Ríos  
Administradora Auxiliar de Protección,  
Preservación y Fortalecimiento a la  
Familia y la Comunidad  
PO Box 194090  
San Juan, PR 00919-4090  
[glenda.gerena@familia.pr.gov](mailto:glenda.gerena@familia.pr.gov)



## GOVERNMENT OF PUERTO RICO

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Department of Health  
Division of Prevention and Control of Chronic Disease

FEBRUARY 27, 2019

Who might be interested:


We confirm that the PR Department of Health (DS), maintains a business relationship with JAYE, Inc. DBA TeleMedik, for the past 14 years. Serving as a delegated entity to many of our services and complying with the performance, quality and regulatory aspects that we demand in our contract. We assure that an open and constant communication is sustained for all business topics.

Respectfully,

A handwritten signature in blue ink, appearing to read "Antonio L. Cases".

---

Antonio L. Cases, MPA  
Director  
Division of Prevention and Control of Chronic Disease

	<b>Equal Employment Opportunity</b>	
Policy Code: <b>ADM CORP 010</b>	Effective Date: 02/2002	Last Review Date: 08/2021
Responsible Officer: Position	Sonia Montes People Services Strategic Division Director	
Authorization: Position	Nilda Guerrero Executive Director	
Next Review Date: 08/2022		<i>This policy will be reviewed annually</i>

**Scope**

This policy applies to all regular and temporary employees and applicants for employment at TeleMedik and its affiliates.

**Policy**

TeleMedik and its affiliates does not discriminate in hiring or employment because of race, color, age, sex, marriage, gender identity, sexual orientation, physical or mental disability, marital or parental status, social or national origin, social conditions, political affiliations, religious, political or gender ideas, sexual assault or stalking, for being in the military, ex-military, serving or having served in the United States Armed Forces or for holding veteran status or any other protected status.

This Policy includes, but is not limited to, all decisions made on promotions, transfers, demotions, reductions in force, discipline, recruiting, compensation, benefits, training, education, or any other terms or conditions of employment. We will endeavor to concentrate on the disabled person's abilities and not disabilities. This policy has the support of the highest levels of management.

**Purpose**

TeleMedik and its affiliates is committed in providing an environment where everyone can expect to be treated equally, with respect and dignity. We believe that all our employees and applicants are entitled to work in a safe, fair, harmonious and enjoyable environment.

**Policy Background and Legal Basis**

We are an affirmative action employer and will act in compliance to all requirements under Executive Order 11246, as amended. We comply with Law No. 100 ("Law No. 100 of June 30, 1959) as amended that regulates employment equal opportunity and prohibit discrimination in the employment, among others.

TeleMedik its affiliates comply with federal laws that prohibit discrimination in employment.

**Definitions**

**Employee** - A person who performs work for an employer under a verbal or written agreement where the employer gives direction of the work to be perform.

**Applicant** – A person interested in a vacant position within the organization.

		<b>Equal Employment Opportunity</b>	
Policy Code: <b>ADM CORP 010</b>	Effective Date: 02/2002	Last Review Date: 08/2021	
Responsible Officer: Position	Sonia Montes People Services Strategic Division Director		
Authorization: Position	Nilda Guerrero Executive Director		
Next Review Date: 08/2021		This policy will be reviewed annually	

**Supervisor/Manager/Director** – A person who has the authority by the employer, to employ, transfer, suspend, fire, reintegrate, promote, assign a task, reward, or discipline other employees in coordination with the People Services Strategic Division staff.

**Responsibilities**

1. Supervisor/Manager/Director - responsible for the compliance of this policy. Must provide a fair application of this policy for all supervised employees and/or job candidates.
2. People Services Strategic Division (Human Resource) Officer - responsible for the orientation and distribution of this policy. Assures compliance and provides coaching to supervisors and managers. Receives and investigates all related concerns of employees.
3. Employee - responsible for compliance with the practices established in this policy.




**Aspects to consider regarding this policy**

All employees are part of our organizations team, we expect that each partner promote an environment where everyone feels safe and confident that all opinions and suggestions will be heard.

1. Any applicant for employment or any employee who believes that employment, promotion, training, transfer, salary adjustment or a merit salary increment was denied or that demotion, transfer, lay-off or termination was forced because of any of the non-work related and protected by law status, may communicate directly with the People Services Strategic Division (Human Resource) Officer or the Executive Director.
2. The People Services Strategic Division (Human Resources) Officer will investigate any allegation of employment discrimination.

**Other related policies**

1. ADM COMP 001 Policies Development and Reviewing Protocol
2. ADM CORP 009 Workplace Harassment Policy
3. ADM CORP 017 Open Door Culture
4. ADM CORP 044 Trabajo a Distancia (Remote Work)
5. ADM CORP 046 Workplace Harassment

		<b>Equal Employment Opportunity</b>	
Policy Code: <b>ADM CORP 010</b>	Effective Date: 02/2002	Last Review Date: 08/2021	
Responsible Officer: Position	Sonia Montes People Services Strategic Division Director		
Authorization: Position	Nilda Guerrero Executive Director		
Next Review Date: 08/2021		<i>This policy will be reviewed annually</i>	

**Amendments**

This policy may be amended as necessary, in compliance with applicable laws and regulations. This document is subject to change depending each client contract and regulation required.

**Separability Clause**

If any word, section or part of this Protocol were to be declared unconstitutional or void by a court of law, such declaration will not affect the remaining dispositions or parts of this Protocol, rather its effect will be limited to the specific word, section or part of the Protocol declared void or unconstitutional. The nullity or invalidity of any word, section or part of this Protocol will not be deemed as affecting in any way its application or validity in any other section or part of the document.

**Attachment**

Yes    No

**Attachments Included**




Attachment A – Investigation Procedure

**NOTE-** The policies and procedures established by TeleMedik belong to the Company and are for the sole use of its employees. These documents are not to be copied nor distributed outside the Company. All policies and procedures should be retained for 6 years from the effective date.

## INVESTIGATION PROCEDURE

We take proactive measures in the administration and conditions of employment for our resources; still, we understand that there might be a need to communicate any adverse event individually so that we promote a transparent process of investigation that aims to safeguard the purpose of equal employment opportunity in an efficient manner.

1. Any employee and applicant who understands that the provisions of the law regarding their individual employment conditions have not been complied with, should notify their supervisor, manager, director or PSSD staff.
2. The supervisor, manager, or director, should take the situation with a sense of immediacy, detailing the action taken to the Officer of the People Services Strategic Division (Human Resources).
3. The People Service Strategic Division (Human Resources) Official will begin the proper process to identify if the equal employment opportunity policy was not complied with; Said process may take from five (5) to fifteen (15) business days and could be extended depending on the ease of obtaining evidence and collaboration of witnesses.
4. Upon completion of the investigation, the People Service Strategic Division (Human Resources) Officer will notify both the employee and the corresponding officials about the findings and final determination.
5. All process will be conducted with a sense of confidence and respect with a sensitivity framework to the employee who brings his individual situation; also, all appropriate action will be documented.

		<b>Free Tobacco, Alcohol and Drugs Environment</b>	
Policy Code: <b>ADM CORP 036</b>	Effective Date: 06/2011	Last Review Date: 05/2022	
Responsible Officer: Position	Sonia Montes Rivera People Strategic Services Division Director		
Authorization: Position	Nilda M. Guerrero De León Executive Director		
Next Review Date: 04/2023		This policy will be reviewed annually	

**Scope**

This policy applies to all regular, temporary, independent contractor and visitor employees of TeleMedik and its affiliates, hereinafter referred to as resources.

**Policy**

TeleMedik has established a policy on the consumption of Tobacco, Drugs and Alcohol, to preserve and improve the well-being of the people who are part of its team. We promote healthy lifestyles so that our employees maintain a good quality of life, proper performance, and competitiveness of the Organization.

**Purpose**




Smoking has been recognized as the first preventable cause of disease that significantly affects our environment and causes deaths that could be avoided in Puerto Rico and the United States. The Behavioral Risk Factor Surveillance System monitors the use of tobacco on the Island and TeleMedik participates in various initiatives to reduce tobacco use; in partnership with public and/or private organizations and initiatives. TeleMedik encourages healthy lifestyles, we promote the control and cessation of the use of substances such as tobacco, illicit drugs, and the frequent consumption of alcohol to obtain holistic health.

**Policy Background and Legal Basis**

According to the Center for Infection Control of Atlanta (CDC) and the objectives set out in the document Healthy People 2030, the need to identify addictive control needs continues to be visualized, promoting the existence of programs for managing addictions. Under the main risk factor which is preventable is smoking control since smoking is the main preventable health risk factor for mortality in Puerto Rico and the United States of America. In Puerto Rico, **Law No. 40 of August 3, 1993**, amended by **Law No. 66 of March 2, 2006**, and **Law No. 59 of April 11, 2011** "Law to Regulate the Practice of Smoking in Certain Public and Private Places", establishes regulations on the practice of smoking in public and private places.

From July 1 to December 31, 2011, the Smoking Cessation program (TeleQuit) was carried out as an added benefit for our smoker employees who voluntarily wished to participate and enrolled during the 30 days of implementation, belonging to to June of that year.



	<b>Free Tobacco, Alcohol and Drugs Environment</b>	
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Authorization: Position	Nilda M. Guerrero De León Executive Director	
Next Review Date: 04/2023		<i>This policy will be reviewed annually</i>

**Definitions**

**Smoking:** Means and includes the activity of inhaling and giving off tobacco smoke or other substances that burn in cigars, cigarettes, and pipes, and possessing or transporting cigars, cigarettes and pipes and smoking articles while they are lit and also includes the use of the so-called electronic cigarette.

**Electronic cigarette:** is defined as any product designed to deliver doses of nicotine in combination with other substances to the user in vapor form, as established by the United States Food and Drug Administration.

**Dependence:** is defined as a situation produced by the repeated consumption of a substance, and characterized by a psychological and physiological need, to the extent of constantly interfering with the life, health, safety, and work of the person.

**Entrance:** doors or access routes to the facilities of our organization.

**Facility premises:** Land identified as privately owned by TeleMedik and its affiliates; includes but is not limited to parking lots, landscaping, building.

**Employee Assistance Program (PAE, in spanish):** program of 8 visits to a private psychological agency that offers professional help for aspects of a personal nature that could affect day-to-day work.

**Smoking Cessation Program:** free and confidential support for smokers to stop this practice.

**Responsibilities**




1. Supervisor/Manager/Director - responsible for compliance with this policy; ensures the fair application of this policy for all employees under their charge.
2. People Strategic Services Division Officer (Human Resources) - responsible for the distribution and orientation of this policy; ensures compliance with this through counseling to supervisors, managers, and directors; receives and investigates any situation presented by any employee related to this policy and its compliance.
3. Employee - responsible for compliance with the practices established in this policy.

**Aspects to consider regarding this policy**

To raise awareness about this problem, these reflections should be made:

- No one is safe from suffering some type of addiction.
- The effects of addictions affect all areas of the person and their environment.
- Only when an addiction is recognized can it begin to be resolved.

Therefore, TeleMedik grants the benefit of the voluntary Smoking Cessation program to all our employees and independent contractors, positively impacting the environment in which we are located,

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Next Review Date: 04/2023		<i>This policy will be reviewed annually</i>

as well as the health of all of us. Also, it intends to establish standards to achieve a tobacco-free environment in our organization.

**Other related policies**

- ADM CORP 010 – Equal Employment Opportunity
- ADM COMP 002 – Confidentiality in the Management of Privileged Information
- ADM COMP 008 – Management of Conflict of Interest
- CLIN TQ 001 – Smoking Cessation Program
- General Rules of Conduct

**Amendments**

This policy may be modified as necessary, in compliance with applicable state and federal laws and regulations.

**Separability Clause**

If there is any word, section or part of this policy that is declared unconstitutional or null by a court or law, that declaration will not affect the remaining provisions of this policy, its effect will be limited to the specific word, section or part declared null or unconstitutional. The nullity or invalidity of any word, section or part of this protocol will not be considered or affect in any way its application or validity in any other section or part of the document.

**Attachments**

Yes     No

**Attachments Included**

Attachment A - Case Management Procedure

**NOTE-** The policies and procedures established by TeleMedik belong to the Company and are for the sole use of its employees. These documents are not to be copied nor distributed outside the Company. All policies and procedures should be retained for 6 years from the effective date.

## PROCEDURE TO CASE MANAGEMENT

At TeleMedik and its affiliates, we are committed to improving the quality of life for our participants, our employees, and the community at large. The effect of the consumption of alcoholic beverages and/or drugs impairs work performance and is a real threat to people's health, safety, and productivity of the organization. For this reason, TeleMedik and its affiliates will ensure that all people who integrate it recognize this threat, increasing the information about this problem and its consequences.

To fulfill this commitment and being aware that the consumption of alcoholic beverages and/or the consumption of illicit drugs affect work performance, this policy is established, its objective being to prevent and help, not to sanction and therefore communicates that:

- The consumption of alcoholic beverages, or the consumption of illicit drugs, is not allowed during the working day, either inside or outside the Organization's facilities.
- It is the responsibility of each person to ensure that while performing their work activity they are not under the influence of alcohol or illicit drugs, which may negatively influence their behavior and the development of their activity.

Likewise, the consumption of alcoholic beverages and/or illicit drug use in private life, which transcends publicly in the form of altercations, accidents or family violence will be considered reprehensible behavior and therefore contrary to TeleMedik's guidelines.

The employee will have the opportunity to voluntarily identify himself at the People Strategic Services Division office and receive guidance for help with the use of illicit drugs, tobacco, or alcohol. In the case of the employee being a smoker and wishing to participate in the Department of Health's toll-free Smoking Cessation line, they may also participate directly in the benefit without having to identify themselves in the People Strategic Services Division by calling the telephone line for the Smoking Cessation program. We are committed that such participation will be completely confidential, so the Health Advisors will offer the program service using the applicable confidentiality standards.

The employee may request to be formally referred to the Employee Assistance Program (PAE), if deemed necessary, as part of the action plan to achieve effective results.

Any employee who fails to comply with this policy will be subject to the corrective action process until termination of employment, in accordance with the General Rules of Conduct.

