

KERN HEALTH SYSTEMS | AI CALLING AGENT

RFQ BIDDER QUESTIONS & RESPONSES

Question	Answer
What are the total annual call volumes?	1M to 1.5M
Is this both inbound and outbound? If so, what is the breakdown in annual volume for each?	Both outbound and inbound, 25% of outbound volume
What contact center platform are you currently using?	Cisco
What CRM are you currently using?	Call Tracking Module from our Internal Core System
Do you have an EHR in place, or is that irrelevant given this is on the payer side?	No
What systems will we be integrating into? Are APIs available for those systems?	Call Tracking Module from our Internal Core System, yes API available.
Can you provide a sample script or call flow for your current process?	Attached
What is the current step-by-step process an agent follows for these interactions?	This process will be outlined when the finalist are chosen.
How many vendors have been invited to respond to this RFP?	All vendors with the capability.
Will you be sending a compiled list of all vendor questions and answers to participants?	Yes
If we are down-selected, will you require a POC/Pilot or move directly to contract?	Yes, will require POC
If a POC is required, will it be a competitive bake-off between vendors or with one selected vendor?	KHS reserves the right to conduct either a competitive pilot or a single-vendor pilot at its discretion. The approach will be confirmed during the down-select phase.
Is the target go-live date the beginning of next year, as discussed?	4th QTR 2025
Are there any contract expirations or operational deadlines driving your timeline?	No
What systems will the AI Worker agent integrate with? Are there documented APIs or integration specifications for these systems?	Detailed interface specs will be provided at down -select
Will the AI worker pull internal member data to answer questions?	Yes
Will the AI worker collect personal member data?	Yes

Please share the details of the current telephony system - Vendor/Software.	KHS operates Cisco for IVR, call routing, and outbound campaigns. Version details and configuration specifics will be provided during down-select.
Any existing contracts with AWS, Azure, GCP, Twilio, Zoom, etc.?	No, all depended on vendor
What languages should the AI agent support?	All languages
Are there accessibility requirements (e.g., TTY, speech-to-text for hearing impaired)?	Yes
What is the expected daily/monthly call volume?	1M to 1.5M per year
How many concurrent calls should the AI agent be able to handle?	100-1500 calls per hour
Is there a preference for cloud-based or privately hosted platforms?	Private
What are the top 3–5 call intents at launch and the specific actions allowed per intent (e.g., verify benefits, provider search parameters, appointment scheduling, SMS/email follow-ups)?	Redeterminations, Gaps in Care, New Member Orientation
Can you provide average and peak call volumes, call type breakdowns (benefits, reminders, provider searches, etc.), and examples of high-priority call scenarios?	This information is not available.
Is there any seasonality in call volumes?	No
Beyond voice, are digital channels (SMS, chat, email, web portal) desired for member engagement now or in future phases?	No
Which specific back-office or clinical processes are highest priority for intelligent automation (RPA, conversational AI, etc.)?	AI
Are there usability or accessibility expectations for staff and member interfaces (e.g., ADA compliance, mobile support)?	ADA Compliance
What are requirements for data segregation, audit logging, and access controls?	KHS requires strict separation of member data, comprehensive audit logging of all access and actions, and role-based access controls with secure authentication. All solutions must comply with HIPAA and KHS security policies.
What is KHS's policy on consent management for AI interactions and use of member data for AI model training?	KHS requires member consent for AI interactions and ensures that any data used for AI model training is de-identified and handled in compliance with HIPAA and privacy regulations.
What expectations are there for explainable AI, bias detection, and mitigation reporting in practical terms?	KHS expects AI solutions to provide clear explanations for decisions, perform regular bias checks, and report findings with any mitigation steps taken.
What criteria should trigger transfer to human agents, and what are required SLAs for handoff?	Transfers should occur for identity failures, urgent or complex issues, or low AI confidence, and handoffs must meet standard service levels for timely response.
Can historical call/chat data be used for initial model training? What is the process for ongoing feedback and tuning?	Yes, historical data may be used if de-identified and compliant, and vendors should support a continuous feedback loop for tuning and improvement.

Does the 95% uptime refer to only autonomous workflows, or to total system availability (including integrations, infrastructure, etc.)?	The 95% uptime requirement applies only to autonomous workflows, as defined in the RFQ.
Which specific KPIs do you require for monthly dashboards (e.g., engagement rates, call resolution, equity, satisfaction scores)?	Engagement, containment, resolution rates, and member satisfaction scores.
What are expectations for incident response, escalation protocols, and severity/timeliness tiers?	Timely response based on severity, with clear escalation paths and documented resolution.
What change management support will help drive member and staff adoption of the platform?	Training, communication, and simple tools to support smooth adoption.
Are alternative pricing or licensing models (beyond rate/minute or fixed fee) considered, such as value-based pricing or subscription tiers?	Yes, KHS will consider value-based or subscription models in addition to standard pricing.
What are likely miscellaneous charges outside quoted fees? Can you share examples of “additional services” historically needed?	Possible extras include language services, custom integrations, and advanced support.
Beyond call automation, does KHS envision expanding the AI Digital Worker platform into other areas (claims, chronic care, pharmacy adherence, referrals)?	Yes, future phases may include claims, chronic care, pharmacy adherence, and referrals.
What telephony/call center infrastructure is currently in place for AI agent integration?	None
How does KHS envision the digital workforce coexisting with live agents (fully autonomous vs. hybrid)?	Hybrid
What is the desired approach for AI training/retraining— vendor-managed vs. KHS-managed?	Vendor-managed with KHS oversight and governance.
Please let us know if there are any additional collateral or documents we can provide to further support and strengthen our responses.	Security, compliance, and integration details are most helpful.
What are the most common support or service requests your teams handle today?	Benefits and eligibility, provider search, ID card requests, and authorization status.
Who will the audience for the Virtual Assistant? (Customers, Employees, Consultants, Partners, Vendors, etc.)	Customers (Members)
Are you able to share your call drivers? Conversation transcripts or call flows for intent identification? A list of wrap-up summary codes?	Sanitized examples can be shared at down-select (no PHI); high-level call flows and wrap-up categories will be provided.
Which CCaaS platform(s) and agent desktop solution are you currently using? Are they deployed on-prem or in the cloud? What is the version?	Cisco UCCX agent desktop on premises with CUCM; version details be provided to finalist.
Which IVR are you using today? What is the version?	Cisco UCCX IVR, on-prem; version details be provided to finalist.
How do you currently measure success in your contact center (e.g., CSAT, NPS, containment rate, agent handle time)?	ASA, abandon rate, SL 80/30, containment/task completion, and member satisfaction (CSAT/NPS).
Are there any agent transfer scenarios the bot must facilitate?	Transfer on identity failure, clinical/safety or PHI-sensitive issues, low confidence, or complex exceptions; warm handoff with context.

Are you using the same platform for both voice and digital interactions (chat, email, SMS)?	Voice runs on Cisco; digital interactions use CRM/portal (roadmap to expand).
Which channels (e.g., phone, web chat, mobile app, SMS, social, email) are currently active for customer communication?	Phone, web portal, email, and SMS (campaigns); chat considered for a later phase.
What types of tasks do your agents handle? How much time do your agents spend handling routine or mundane tasks?	Benefits & eligibility, provider navigation/PCP changes, ID cards, and authorization status; routine portions are targeted for automation.
How do your agents currently find information (e.g., FAQs, next best actions, documentation)? Is there a centralized system?	Dynamics 365 knowledge, SharePoint, and SOPs; harmonized, not a single repository.
Do you have a system in place for coaching or guiding agents during live interactions? If no, are you looking to improve agent productivity with tools like agent assist that offers playbooks, coaching, next best actions, and automated wrap-up?	Limited today; open to agent-assist (playbooks/next best action/auto wrap-up) in roadmap.
What the tools your agents use to handle and document customer interactions — including how they gather information, log details, and complete post-call summaries?"	CTI + CRM (D365) for call logging; QNXT call tracking for specific processes; additional secure tools as needed.
How is your knowledge content currently managed and accessed (e.g., website, SharePoint, Confluence, PDFs, internal tools)?	Members: website/portal. Agents: D365/SharePoint. Content is aligned but surfaced separately.
Do agents and customers use the same content repositories?	No, separate surfaces, coordinated content.
What backend systems (CRM, ticketing, ERP, knowledge base, etc.) would the virtual assistant need to connect to?	Dynamics 365, QNXT, ZeOmega Jiva, Cisco CTI, and data exchange endpoints (e.g., EDI/SFTP).
Are you currently using any RPA platforms like UiPath or Automation Anywhere for back-office automation?	No enterprise-wide RPA platform in scope.
Do you have preferences around Virtual Assistant deployment (Kore SaaS, on-prem, private cloud)?	HIPAA-compliant SaaS in the U.S. preferred; Azure alignment; on-prem by exception.
What are your expectations around authentication and access control (e.g., SSO, OAuth, AD)?	Azure AD/SSO, OAuth, RBAC/least-privilege, with audit logging.
Are there compliance or security standards we need to be aware of?	SOC II, HITRUST
Besides English, are there any other languages you plan to support?	All languages available
Are you currently using any LLMs or GenAI tools? If so, which ones?	No
Do you have a preference for ASR (Automatic Speech Recognition) and TTS (Text-to-Speech) providers?	No fixed vendor; prioritize English/Spanish accuracy, low latency, and telephony-grade streaming. Please include WER/latency stats.
Can you share high-level metrics like monthly call/chat volumes, average handle times, and current automation/containment rates?	Not sharing metrics in this round; provide assumptions and improvement targets—details will be shared at down-select.
What functions do you expect the Virtual Assistant to perform (e.g., FAQs, task completion, form fill, handoff to agent)?	FAQs, task completion, simple form capture, and warm handoff to agents.

Should the Virtual Assistant be capable of small talk, proactive suggestions, or personalized responses?	Limited small talk; task-relevant prompts only; personalization based on verified identity/consent.
Metrics to Scope ROI:	KHS will validate during down-select
Number of inbound calls per month	KHS will validate during down-select
Number of digital chats per month	KHS will validate during down-select
Average length of call - Agent (voice) (in min)	KHS will validate during down-select
Average length of chat - Agent (chat) (in min)	KHS will validate during down-select
Voice automation improvement target (%)	KHS will validate during down-select
Digital automation improvement target (%)	KHS will validate during down-select
Agent handle time reduction target (voice) (percentage)	KHS will validate during down-select
Agent handle time reduction target (digital)	KHS will validate during down-select
What is the avg. cost per call? Does that include the Telco cost as well?	Not disclosed in this round. Use vendor assumptions.
What is the avg. cost per chat?	Not disclosed in this round. Use vendor assumptions.
What solutions are used for Quality Management?	Existing QA/QM processes in place; integrate with current workflows (tool details provided at down select)
For EX use cases, how many employees would be interact with the bot/automation?	TBD; start with a small pilot cohort if included in scope.
Can you confirm the cloud provider and hosting environment used for your deployment?	HIPAA-compliant SaaS in the U.S., Azure-aligned preferred; Cisco on-prem telephony remains in place.
Who will the audience for the Virtual Assistant? (Customers, Employees, Consultants, Partners, Vendors, etc.)	Members
What types of tasks do your agents handle? How much time do your agents spend handling routine or mundane tasks?	Outbound member calls and Inbound calls