



**Philadelphia College of Osteopathic Medicine
(PCOM) Department of Procurement Services**

**Request for Proposals (RFP)
PCOM Call Center
RFP #2026-002**

Issue Date: March 10, 2026

Response Deadline Date/Time: March 23, 2026, by 4:59PM EST

Response Submission Information:

Submitted electronically to legalaffairs@pcom.edu

Email Subject Line: PCOM Call Center - RFP#2026-002

Response Contact Information:

**Danielle McNichol, Chief Legal Affairs and Compliance
Officer**

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1.0 Introduction and General Information

1.1 Introduction and Overview of RFP

Philadelphia College of Osteopathic Medicine (“PCOM” or the “College”) invites proposals from qualified vendors to perform certain services (the “Services”) at the PCOM Healthcare Centers, as more specifically described in **Appendix A** of this RFP.

Following its review of statement of qualifications (“SOQ” or “Qualifications”) submitted by interested proposers (“Respondents”), PCOM has selected a shortlist of qualified Respondents (“Shortlisted Respondents”), who have demonstrated their relevant experience, capabilities, and proposed approach to delivering the Services listed above. PCOM requests that such Shortlisted Respondents respond to this Request for Proposals (“RFP”) for the Services, as set forth herein and submit their respective proposals (“Proposals”) in accordance with the terms and conditions of this RFP.

1.2 Background

Founded in 1899, Philadelphia College of Osteopathic Medicine is a private, nonprofit, graduate-level medical institution that offers doctoral and graduate programs across campuses in Philadelphia, PA (PCOM), Suwanee, GA (PCOM Georgia), and Moultrie, GA (PCOM South Georgia). In keeping with the College’s mission to train primary care physicians, PCOM also operates several healthcare centers and an osteopathic manipulative medicine clinic at its Pennsylvania and Georgia locations. Additional details about PCOM can be found at the following [link](https://www.pcom.edu/about/) (https://www.pcom.edu/about/).

2.0 Additional Sources of Information

The following are links to additional information that Respondents may review in preparing their Proposals:

Description	Links
PCOM Website	https://www.pcom.edu
PCOM Legal Affairs Website	https://www.pcom.edu/about/department/s/legal-affairs/
PCOM Department of Procurement Services Webpage	https://www.pcom.edu/about/department/s/purchasing
PCOM Purchase Order Terms & Conditions	https://www.pcom.edu/about/department/s/purchasing/documents/PO-terms-and-conditions.pdf
PCOM Minimum Insurance Requirements	https://www.pcom.edu/about/department/s/purchasing/documents/insurance-requirements.pdf
PCOM Higher Education Opportunity Act (HEOA) Disclosures	https://www.pcom.edu/disclosures

3.0 RFP Overview and Questions

3.1 Overview of the RFP Process

Through this RFP process, PCOM is seeking to select the most qualified, responsive partner to provide comprehensive patient access call center services for its multi-site primary care and specialty clinic network. The Partner will serve as an extension of PCOM's front-office operations, delivering efficient, consistent, and measurable patient contact center operations across voice and multi-channel communications.

The selected Partner must deliver these services using PCOM's existing systems, including secure access to PCOM's on-premises NextGen electronic medical record (EMR) environment where required. All services must comply with HIPAA and applicable healthcare data security requirements.

PCOM will evaluate the Proposals according to the information submitted in this RFP, but reserves the right to conduct independent research in order to confirm its evaluation.

Upon receipt, Proposals will be reviewed for completeness in accordance with the submission requirements and assessed in certain areas, and with respect to the standards, set forth in this RFP. PCOM reserves the right to disqualify any response to the RFP that does not completely fulfill these requirements. PCOM reserves the right to accept or reject any or all submissions.

3.2 Timeline of Key Events

Event Name	Date/Deadline
RFP Issuance	03/10/2026
Deadline for Written Inquiries/Questions	03/13/2026
Response to Written Inquiries/Questions	03/16/2026
Deadline for Proposal Submission	03/23/2026
Notification of Contract Award (subject to change)	Week of 04/10/2026

PCOM reserves the right to modify the above schedule at its discretion. Any changes or additional information regarding the RFP schedule and pre-submittal activities, including PCOM's responses to questions of Respondents and any clarifications and amendments released with regard to this RFP, will be posted on the PCOM Legal Affairs Department webpage at: <https://www.pcom.edu/about/departments/legal-affairs/>. It is the responsibility of all interested parties to check this webpage periodically to obtain clarifications and amendments.

3.3 RFP Submittal Questions

PCOM will entertain questions in connection with this RFP from Shortlisted Respondents. All questions regarding the RFP are due from such Respondents by 5:00pm EST on March 13, 2026. Questions should be submitted via e-mail to legallaffairs@pcom.edu. Respondents are prohibited from contacting any undesignated PCOM officials or advisors of PCOM. Respondents are advised that unauthorized contact with PCOM officials, related parties or advisors of PCOM may result in disqualification of such Respondents from this RFP process.

3.4 Terms and Conditions; Contracting Process

Respondents must comply with the requirements and specifications contained in this RFP, including, without limitation, the General Terms and Conditions set forth in **Attachment A** of this RFP.

Respondents invited to submit Proposals in this RFP process may be required to execute a contract in a form substantially similar to the agreement between PCOM and PCOM's contractor (the "**Agreement**"), which includes PCOM's insurance requirements and indemnification provisions, attached to this RFP as **Attachment B** (also referred to as the "**Master Agreement**"). The Master Agreement specifies the Services generally, but PCOM reserves the right to modify the Agreement and adjust the Services as necessary for the Project. PCOM will not consider any substantive changes to the form of Agreement if they are not submitted at or before the time the Respondent's response is due.

Respondents acknowledge and agree that: (i) PCOM provides this draft form of Master Agreement to help expedite the negotiation process, (ii) this draft is subject to change at PCOM's discretion, and (iii) the draft is for review purposes only. Notwithstanding the foregoing, the terms and conditions contained in the Master Agreement or, in the sole discretion of PCOM, terms and conditions substantially similar to those contained in the Master Agreement, will constitute and govern any agreement that results from this RFP.

Any exceptions to the terms and conditions of the Master Agreement, as well as any additional required language, terms or conditions, must be documented and submitted with the responses of the Shortlisted Respondent(s) and are subject to PCOM's review. Such exceptions and/or additional terms and conditions may be deemed by PCOM (in its sole discretion) as non-conforming and may result in disqualification of Respondents' responses as non-responsive to this RFP, at PCOM's sole discretion.

4.0 Submittal Requirements

The following constitutes the submittal requirements for the Respondents' Proposals. The RFP responses of Respondents must follow the order provided below to facilitate review of the responses. In addition, the RFP response must provide tabs correlating to each of the evaluation criteria numbers below.

Total response should be limited to 25 pages (not including the Cover Letter) beginning at Tab 1. Tabs that include text, photographs, and/or graphics will be counted as pages. Tabs showing only the tab title and number will not be counted as pages. All pages should be numbered.

Please note that the submittal requirements and evaluation criteria listed in this RFP apply to the entire members of the Respondent's team. Information pertaining to potential team members should be submitted as part of the Respondent's RFP response.

4.1 Submittal Instructions

Submittals of Proposals must respond to each criterion in the following order:

- Cover Letter
 - Include any requested changes to the proposed team of the Respondent since submission of the SOQ, including any addition of new member to the Respondent's team, together with such new member's name, address, telephone number, and email address. Note that changes to the proposed team continue to be subject to the RFP and PCOM's review, and Respondents should include an explanation justifying the changes to their proposed teams. PCOM reserves the right to re-score the replacement of any team members or key personnel of the Respondent.

- **Table of Contents**
- **Tab 1: - Executive Summary & Understanding of PCOM Objectives**
Provide a concise summary of the Respondent's understanding of PCOM's goals and requirements.
Include:
 - Overview of proposed solution
 - Summary of how the Respondent will support PCOM's patient access objectives
 - Key differentiators of the Respondent's approach
- **Tab 2: – Proposed Work Plan and Methodology**
Provide a detailed description of the Respondent's operational model and methodology for delivering the services described in Appendix A.
Include:
 - Approach to centralized patient access operations
 - Multi-channel communications strategy (voice, SMS, email)
 - Integration with NextGen EMR workflows
 - Quality assurance and performance monitoring approach
 - Governance and operational management structure
- **Tab 3: – Proposed Personnel, Technology, and Resource Allocation**
Describe the personnel, technology platforms, and operational resources that will support the Services.
Include:
 - Key personnel and roles
 - Organizational structure
 - Call center technology platform
 - Reporting and analytics tools
 - Staffing model and operational coverage
- **Tab 4: – Implementation Plan and Project Schedule**
Provide a detailed implementation plan for onboarding PCOM and transitioning services.
Include:
 - Implementation phases and timeline
 - Transition approach from the current call center vendor
 - Technology configuration and integration approach
 - Training plan
 - Implementation schedule or timeline
- **Tab 5: – Pricing Proposal**
Provide a detailed pricing proposal including all costs associated with the Services.
Include:
 - Pricing model (per call, per FTE, per location, etc.)
 - Core service pricing
 - Pricing for optional capabilities
 - One-time implementation costs
 - Billing structure and reimbursable costs
- **Tab 6: – References and Relevant Experience**
Provide references demonstrating experience delivering similar services.
Include:
 - At least two client references

- Description of services performed
- Contact information for each reference
- Relevant healthcare or patient access experience
- **Tab 7: – Supporting Materials (Optional)**
Include any additional information that supports the proposal.
Examples:
 - Sample reports
 - Sample call scripts
 - Case studies
 - Implementation diagrams
- Suggested redlines to **Attachment B – Master Agreement** (if applicable)
- Any additional relevant documents (Word, PDF, or Excel format, as appropriate, if applicable)

Respondents should organize their Proposal using the tab structure outlined above to facilitate PCOM's evaluation process.

Each Proposal should be complete and definitive when submitted. Alternatives should not be included unless specifically requested. Proposals should be self-explanatory and submitted on the most favorable terms from a price and technical standpoint that the Respondent can submit to PCOM. Respondents should not assume that they will be contacted or afforded an opportunity to clarify, discuss or revise their Proposal before an award is made. However, PCOM reserves the right in its discretion to enter into negotiations with a Respondent.

Response Submission: An **electronic** copy must be submitted as follows:

- The response must be **signed**, demonstrating execution by means of (i) an electronic signature (e.g., DocuSign), (ii) an original, manual signature, or (iii) a faxed, electronic image scan transmission (e.g., "pdf" or "tif" via electronic mail) or photocopied manual signature.
- The response must be received electronically to the E-Mail shown in the **Response Submission Information** section of the cover page of this document.
- Electronic submission must be received by the required **Response Deadline Date/Time** reflected on the cover page of this document.
- Response submissions that exceed **20 MB** will be submitted with multiple emails modifying email subject line shown in the **Response Submission Information** section of the cover page of this document to include: **Submission 1 of X** ('X' representing the number of files being submitted).

Non-Response Submission: PCOM will not consider non-responsive submissions, i.e., those with material deficiencies, omissions, errors or inconsistencies or that otherwise do not follow instructions. PCOM in its sole discretion will determine what is non-responsive.

5.0 Method of Review and Proposal Evaluation

From the date this RFP is issued through the date of PCOM's award of contract (the "**Evaluation Period**"), each Respondent submitting a Proposal (including its employees, agents, representatives and/or sub-contractors) is prohibited from having any non-solicited communications with any person inside PCOM or any affiliates of PCOM if the communication refers to the content of Respondent's Proposal, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of Proposals.

Respondents not in compliance with this provision may be subject to disqualification, unless it is determined,

in PCOM's discretion, that the communication was harmless, that it was made without intent to influence, and that the best interest of PCOM would not be served by the disqualification.

A Respondent's submittal may be disqualified if any of its identified teammates engage in any of the foregoing communications during the Evaluation Period. Only those discussions, communications or transmittals of information authorized or initiated by PCOM for this RFP or general inquiries directed to the PCOM Procurement Services Department regarding requirements of the RFP (prior to the submission deadlines for Proposals) or the status of the contract award notifications (after submission) are excepted from this provision.

5.1 Description of Evaluation Criteria

Proposals:

i. Proposed Work Plan and Methodology; Overall Management Approach

PCOM will evaluate the Respondent's proposed work plan and methodology for delivering the services described in this RFP. This evaluation will focus on the Respondent's demonstrated understanding of PCOM's patient access objectives and its proposed approach to implementing and operating a centralized call center solution.

Respondents should clearly describe their operational model, implementation strategy, and ongoing management approach for providing patient access call center services. The evaluation will consider factors such as the clarity and completeness of the proposed methodology, the effectiveness of the proposed operational workflows, the integration of multi-channel communication capabilities, and the ability to support PCOM's scheduling and patient engagement requirements within the NextGen EMR environment.

PCOM will also consider the Respondent's approach to quality assurance, reporting, and continuous improvement, as well as the proposed methods for ensuring compliance with healthcare privacy and security requirements.

ii. Proposed Personnel / Equipment and Resource Allocation

PCOM will evaluate the qualifications, experience, and availability of the personnel proposed to perform the services. This includes key leadership, operational management staff, and any other personnel responsible for implementation, operations, reporting, and account management.

The evaluation will consider the Respondent's ability to provide sufficient staffing and operational resources to support PCOM's patient access needs, including call handling capacity, scheduling support, and automated outreach operations. Respondents should clearly describe how responsibilities will be assigned among team members and how operational decisions and escalations will be managed.

PCOM will also review the technologies and systems proposed to support the services, including call center platforms, communication tools, reporting systems, and any other operational technologies required to support the scope of services outlined in Appendix A.

iii. Project Criteria / Enhancements / Schedule

PCOM will evaluate the Respondent's proposed implementation strategy and project timeline for transitioning services to the selected Partner. This evaluation will consider the Respondent's ability to implement services efficiently while minimizing disruption to existing healthcare center operations.

Respondents should provide an implementation schedule that includes major project phases, milestones, and estimated timelines for onboarding, system configuration, testing, training, and go-live. PCOM will also consider any proposed enhancements or value-added capabilities that may improve patient access, operational efficiency,

or patient engagement.

Examples of enhancements may include digital patient engagement tools, self-scheduling capabilities, advanced reporting tools, or other technologies that support improved patient access outcomes.

iv. Pricing / Rates

PCOM will evaluate each Respondent's pricing proposal to determine the overall value of the proposed services.

- Pricing proposals should clearly describe the Respondent's proposed fee structure and all associated costs for providing the services described in this RFP.
- Respondents must provide detailed pricing information including base service pricing, pricing for optional capabilities, and any one-time implementation or onboarding costs.
- Pricing proposals should clearly identify billing structures (such as per-call pricing, per-provider pricing, per-location pricing, or other applicable models), as well as any reimbursable expenses or additional service fees.

For evaluation purposes, proposals will be normalized to a common scope of services to allow PCOM to compare pricing across Respondents. Proposals offering the most favorable overall cost structure relative to the proposed services will receive higher scores in this category.

v. Overall Quality of Submission

PCOM will evaluate the overall quality, clarity, and completeness of each Proposal submission. This includes the organization of the proposal, responsiveness to the RFP requirements, and the extent to which the Respondent provides clear, thorough, and well-supported information.

PCOM may consider relevant client references and demonstrated experience performing similar services when evaluating the overall quality and responsiveness of the proposal.

PCOM may also consider factors such as the Respondent's demonstrated understanding of the project requirements, the professionalism of the submission, and the overall ability of the Respondent to serve as a collaborative partner to PCOM.

5.2 Evaluation Criteria: Scoring Weights

The evaluation score for Proposals will be based on a **100-point** scale and will measure the degree to which each response meets the following criteria:

Category	Points
Operational Approach / Methodology	30
Personnel and Technology	20
Implementation Plan	20
Pricing	20
Proposal Quality / References	10
Total Points	100

All tie scores of submitted responses (if any) will be broken by PCOM, at the complete and exclusive discretion of PCOM.

In evaluating Respondents' Proposal submissions, PCOM reserves the right to take any of the following steps, with respect to either all of the submissions received or to a subset of submissions selected as superior to the others: (1) consult with prior clients on the performance of the bidder or of particular persons proposed for this bid; (2) schedule presentations or interviews with representatives of the bidder or persons proposed for the project; (3) conduct a review of past performance, including a review of reports, analyses, or other materials that would reflect the bidder's performance; and (4) request additional data or supporting material.

Evaluation Scoring Methodology

Each Proposal will be evaluated using a standardized scoring rubric using the following scale:

Score	Description
5 – Excellent	Proposal significantly exceeds the stated requirements and demonstrates exceptional capability, innovation, and clarity.
4 – Good	Proposal meets all requirements and demonstrates strong capability and understanding of the services required.
3 – Acceptable	Proposal adequately meets the requirements but may lack detail or demonstrate limited differentiation.
2 – Marginal	Proposal partially meets the requirements but raises concerns regarding feasibility, completeness, or execution.
1 – Poor	Proposal fails to meet the requirements or demonstrates significant weaknesses.
0- Non-Responsive	Proposal does not address the requirement or fails to provide sufficient information for evaluation.

6.0 Disclaimer

Any representations or statements made within this RFP shall not be considered a contractual obligation by PCOM and the Respondents shall not be entitled to rely upon them. PCOM reserves the right to reject any and all submittals and to identify and select the Respondents which PCOM, in its sole and absolute discretion, deems most qualified.

The Respondents shall be solely and totally responsible for all costs associated with responding to this RFP, and the College accepts no responsibility with regard thereto. Submissions will become the property of PCOM.

PCOM reserves all rights in administering this RFP, including (but not limited to) the rights to:

- Reject any or all submittals at any time;
- Terminate evaluation of any or all submittals at any time;
- Suspend, discontinue and/or terminate negotiations with any Respondent at any time prior to the actual authorized execution of the Master Agreement;
- Negotiate with a Respondent without being bound by any provision in its submittal;
- Accept and review a nonconforming submittal;
- Request or obtain clarifications, revisions or additional information from any source;
- Issue addenda to and/or cancel this RFP;
- Issue a new request for qualifications and proposals;

- Extend any deadline or time and waive or permit the correction of minor deficiencies or irregularities in a submittal and minor or technical violations of this RFP; and
- Change the scope and the range of services from what is defined in this RFP at any time.

This RFP does not commit PCOM to enter into a contract. In no event shall PCOM be bound by, or liable for, any obligations with respect to a project or services to be performed or materials and/or products to be provided by qualified contractors until such time (if at all) as a Master Agreement, in form and substance satisfactory to PCOM, has been executed and properly authorized, and then only to the extent set forth therein.

Under no circumstances shall PCOM be liable for, or reimburse, the costs incurred by Respondents, whether or not selected for negotiations, in developing submittals or in negotiating agreements.

In submitting its Proposal, each Respondent expressly waives, on behalf of itself, its partners, joint venture members, officers, employees and agents, any claim against PCOM and their respective officers and employees, for any damages that may arise therefrom.

Any and all information PCOM makes available to Respondents shall be as a convenience to the Respondents and without representation or warranty of any kind.

[Remainder of this page is intentionally left blank; attachments to this RFP begin on the next page.]

ATTACHMENT A: General Terms and Conditions

1. Revisions to the Request for Proposals. In the event that it becomes necessary to revise any part of this RFP at any point prior to the assigned response deadline, revisions will be posted on the webpage of PCOM's Department of Legal Affairs and PCOM will reach out to Respondents. PCOM shall be the sole determinant of whether any revisions/addenda should be issued as a result of any question or other circumstances, and will extend the Proposal deadline if, in PCOM's sole judgment, such information significantly amends this solicitation or makes compliance with the original deadline impractical.
2. Ownership of Materials. Ownership of all data, materials and documentation originated and prepared for PCOM pursuant to this RFP shall belong exclusively to PCOM.
3. Errors in RFP Responses. PCOM will not be liable for any errors in Respondents' Proposals. Except during negotiations initiated by PCOM (if any), modifications to Proposals will not be accepted after the deadline. In no event will PCOM permit a Respondent to submit subsequent material modifications to a Proposal. THE PROPOSAL AS SUBMITTED WILL BE THE LAST AND FINAL OFFER.
4. Withdrawing RFP Responses. Respondents may withdraw their Proposals at any time prior to the applicable deadline by submitting a written request to PCOM from an authorized representative of the Respondent. After withdrawing a Proposal, the Respondents may submit another Proposal at any time prior to the due date.
5. Timely Submissions Required. It is the responsibility of all Respondents to ensure their Proposals are received by PCOM no later than the appointed hour and date for submission as stated in the RFP. Late submittals will not be accepted.
6. Reservation of PCOM's Rights. In addition to any other rights provided hereunder or any of the Agreement Documents, PCOM expressly reserves:
 - a. The right to reject any and all Proposals or any portion thereof. Neither receipt of a Statement of Qualifications and Proposal nor failure to reject shall impose any legal obligation on PCOM;
 - b. The right to purchase products or services covered under any Agreement that may result from this RFP through a separate competitive bidding procedure if PCOM, in its sole discretion, deems it in its best interest; and
 - c. The right to make awards on an item by item, total or lump sum basis (if applicable).
7. Firm Pricing. All prices provided by Respondents shall remain firm for the entire term of the Agreement.
8. Response Validity. Unless provided otherwise herein, all responses (Qualifications and Proposals) shall be valid for **ninety (90)** days from the due date of the response.
9. Acknowledgement and Certification of Respondents. By submitting of its Proposal, each Respondent:
 - a. Acknowledges and accepts: (i) for a purchase order, PCOM's Purchase Order [Terms & Conditions](#); or (ii) for a services agreement valued at more than \$50,000 PCOM will forward another form of services agreement to the Respondent(s) qualified through this RFP to negotiate and execute such services agreement];
 - b. Acknowledges that scholarships, donations or gifts to the College will not be considered in the evaluation of responses; and
 - c. Certifies that the Proposal is made without prior understanding, agreement, or connection with any entity or person submitting a bid/offer for the same services, and is in all respects fair and without collusion or fraud. Each Respondent agrees to abide by all conditions of this solicitation and

certifies that the signatory is authorized to submit the Proposal for the Respondent.

10. Order of Precedence. The Agreement entered into by the parties shall consist of the Master Agreement, the RFP, the Respondent's submitted Proposal (including all appendices or attachments and clarifications, the specifications including all modifications thereof) and a Purchase Order (if applicable) requiring signatures of PCOM and the Respondent (collectively, the "**Agreement Documents**"). In the event of a conflict of terms, the following precedence will apply:
 - i. Master Agreement
 - ii. Amendments to the Master Agreement
 - iii. RFP
 - iv. Respondent's Proposal
 - v. Purchase Order (if applicable)
 11. Use of PCOM Name. Respondents shall not use PCOM' name, logos or other trademarks in any marketing and/or advertising media without prior written approval from PCOM.
 12. Communications. Respondents are to direct all questions related to this RFP to the PCOM contacts identified herein. Unauthorized contact, discussions or requests for meetings with any other PCOM personnel during the bid process may result in the rejection of your Proposal.
 13. Confidentiality.

Respondents may be given access to records that are confidential under Pennsylvania law solely for the purpose of performing the required services under the Master Agreement. Respondents (including their respective employees, agents and subcontractors, as applicable) shall be required to sign a nondisclosure agreement ("NDA") attached as **Attachment C** of this Request for Proposals prior to their receipt of such documents obligating Respondents and each employee, agent, and subcontractor of Respondents to comply with the limitations and provisions of the NDA.

The information contained in responses submitted for PCOM's consideration in either the RFQ phase or the RFP phase will be held in confidence, subject to the terms and conditions of the NDA.
 14. Authorization.

Any Agreement or contract for services and/or goods that will, or may, result in the expenditure by PCOM of \$50,000 or more must be approved in writing by Chief Legal Affairs Officer, and it is not approved, valid or effective until such written approval is granted.
-

ATTACHMENT B: Master Agreement (Sample)

<https://acrobat.adobe.com/id/urn:aaid:sc:US:d593765f-6237-4442-94a6-0107b996c940>

ATTACHMENT C: Non-Disclosure Agreement

<https://acrobat.adobe.com/id/urn:aaid:sc:US:282c2501-714b-43d2-a332-f3417986ac63>

Appendix A – Scope of Work / Project Specifications

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1. Purpose

PCOM Healthcare Centers (“PCOM”) is seeking a qualified partner to provide comprehensive patient access call center services for its multi-site primary care and specialty clinic network. The Partner will serve as an extension of PCOM’s front-office operations, delivering efficient, consistent, and measurable patient contact center operations across voice and multi-channel communications.

The selected Partner must deliver these services using PCOM’s existing systems, including secure access to PCOM’s on-premises NextGen electronic medical record (EMR) environment where required. All services must comply with HIPAA and applicable healthcare data security requirements.

2. Scope of Core Services

2.1 Inbound Call Handling

The Partner will provide live support for inbound patient calls, including:

- Appointment scheduling, rescheduling, and cancellations
- Patient visit type identification and provider availability information
- Message capture and appropriate routing to PCOM teams
- Accurate capture of patient demographics and insurance data
- Consistent scripting and call handling protocols
- Insurance eligibility capture or verification during scheduling when applicable
- Coordination of appointment reminders, confirmations, and cancellations

Consistency across all PCOM locations and adherence to PCOM schedule rules are required.

2.2 Outbound Patient Outreach (required) & Engagement Campaigns

The Partner will provide outbound patient contact leveraging multi-channel automated outreach tools as a required capability, including:

- Automated appointment reminders via phone, SMS/text, and email
- Two-way messaging where patient responses (confirm/cancel/reschedule) update scheduling systems
- No-show follow-up and rescheduling campaigns
- Recall and engagement campaigns for preventative and follow-up care

Automated multi-channel outreach is required as part of core services to reduce manual outreach load and improve access outcomes. ([FlyFone](#))

3. Scheduling & Front-Office Operations

3.1 Centralized Scheduling Model

The Partner must support a centralized scheduling workflow that:

- Applies consistent business rules across providers and sites
- Ensures scheduling accuracy and adherence to PCOM visit templates
- Handles referral intake and appointment coordination
- Capture or verify insurance information during scheduling and coordinate eligibility verification workflows when required.
- The scheduling model should eliminate site-by-site variance and improve operational predictability.

3.2 NextGen EMR Operational Experience

Respondents must describe their experience supporting patient scheduling and call center operations within the NextGen EMR environment, including the following:

- Experience configuring or working with NextGen scheduling templates and visit types
- Methods used to ensure scheduling accuracy within NextGen rules and provider templates
- Approach to handling appointment confirmations, rescheduling, and cancellations within the EMR workflow
- Any prior implementations supporting NextGen on-prem environments

3.2 Patient Self-Scheduling (Optional Capability)

Respondents must describe whether their solution supports online patient self-scheduling functionality.

Vendors must describe:

- How patients can schedule appointments digitally (web or mobile)
- Integration with PCOM scheduling rules and visit templates
- Provider slot availability controls

- Security and patient authentication mechanisms

4. Reporting, Performance, and Quality

4.1 Operational Reporting

The Partner must provide robust reporting that includes:

- Real-time dashboards (or near real-time access)
- Monthly and quarterly performance reports
- Site-level and provider-level breakdowns
- Key performance indicators (KPIs), including:
 - Average speed to answer
 - Call abandonment rate
 - Scheduling accuracy
 - First-call resolution
 - Message turnaround time
 - Automated outreach delivery and response rates
 - Outbound campaign success rates (recall, engagement, rescheduling)

Clear documentation of definitions and formulas used in reporting is required.

4.2 Healthcare Workflow and Escalation Handling

Respondents must describe how their call center agents handle clinical or operational escalation scenarios during patient calls, including:

- Requests for urgent appointments or same-day visits
- Calls involving clinical symptoms requiring triage or escalation
- Handling of referral coordination or follow-up scheduling
- Escalation to clinic staff when a call cannot be resolved at the call center level
- Documentation of the interaction within the EMR or scheduling system

Respondents should provide examples of call flows or escalation protocols used in similar healthcare environments.

4.3 Quality Assurance & Training

The Partner shall maintain:

- A documented QA program with defined methodology
- Regular QA reviews and calibration with PCOM leadership
- Comprehensive onboarding and ongoing training specific to PCOM policies and workflows

Quality assurance must be tied to performance improvement plans.

5. Multi-Channel Communications & Technology Responsibilities

5.1 Channel Capabilities

The Partner must describe capabilities in:

- Voice/Phone – platform and telephony stack, including IVR and call routing
- SMS/Text Messaging – automated and two-way messaging for reminders and engagement
- Email – appointment confirmations and automated communications
- Web/Chat or self-service (if supported) – capabilities and integration approach

Partners must clearly indicate which channels are supported as part of the core service and the technology used to deliver them.

5.2 Technology Provided by Partner

The Partner must identify:

- All contact center software, automation platforms, dialers, and messaging systems they will provide
- How these technologies integrate with PCOM's scheduling systems and data flows
- Platform access for PCOM reporting and oversight

5.3 Technology Provided by PCOM

Respondents must clearly state what systems, network access, or data PCOM must provide, including:

- Connectivity to the PCOM phone system or VoIP environment
- Scheduling/EHR integration points
- Access to patient consent and contact preference data
- Secure remote access requirements for agents

The RFP response must delineate responsibility boundaries for technology delivery and integration.

Capability Mapping Requirement

Respondents must provide a capability mapping that aligns their proposed solution to the functional capabilities referenced in this RFP and in supporting materials referenced by PCOM. Vendors should clearly identify which capabilities are included in their base service and which are offered as optional modules.

6. Implementation & Transition

6.1 Implementation Plan

The Partner must provide a detailed implementation plan that includes:

- Workflow assessment and documentation
- Agent training and shadowing schedules
- Migration plan supporting transition from the current call center vendor
- Testing and validation criteria for go-live
- Cutover strategy ensuring minimal disruption

The implementation plan must include milestones, required PCOM resources, and acceptance criteria. To ensure consistency across proposals, respondents should include a **sample implementation model** that outlines the major phases of onboarding and operational launch. The model should include key activities, responsible parties, and estimated timelines.

6.2 Implementation Assumptions & Responsibilities

Respondents must clearly identify any assumptions or dependencies that could impact the implementation timeline or scope.

Proposals should include:

- Vendor Responsibilities
- Project management and implementation leadership
- Development of implementation timeline and milestones
- Configuration of contact center technology and workflows
- Integration with PCOM systems including the NextGen EMR where required
- Agent training and operational readiness
- Testing, validation, and go-live support

PCOM Responsibilities

- Identification of internal project leads and subject matter experts
- Access to scheduling templates and provider rules
- Technology access required for integration and testing

- Participation in user acceptance testing and validation
- Approval of final workflows prior to go-live

Respondents should identify any additional PCOM resources required during implementation and provide estimated time commitments where applicable.

6.3 Implementation Cost Disclosure

Respondents must clearly identify all one-time implementation costs associated with their proposed solution, including but not limited to:

- System configuration and platform setup
- EMR integration or interface development
- Data migration or patient data configuration
- Training and onboarding
- Project management or implementation services

7. Performance Standards

Partners must propose their ability to meet or exceed the following service levels:

Service Metric	Target
Average speed to answer	≤ 30 seconds
Call abandonment rate	≤ 5%
Scheduling accuracy	≥ 98%
First-call resolution	≥ stated in vendor response
Message turnaround time	≤ 1 business day

These benchmarks align with standard call center RFP KPI expectations and help ensure quality outcomes.

8. Compliance & Security

All Partner solutions must:

- All Partner solutions must comply with HIPAA and other applicable healthcare privacy regulations. The selected partner must execute a **Business Associate Agreement (BAA)** with PCOM prior to accessing or processing protected health information.
- Employ encrypted data transmission and storage for PHI
- Support role-based access controls and audit logging

Vendors must provide documented security and compliance protocols.

9. Governance & Partnership Requirements

The Partner must describe:

- Account management and escalation procedures
- Regular performance review cadence with PCOM leadership
- Change control and SOP update processes
- Continuous improvement approaches

The governance model should support collaborative service development and mutual transparency.

10. Technology Responsibilities

Respondents must clearly identify:

Vendor Provided Technology

- Call center platform
- Messaging and automation tools
- Reporting dashboards
- Scheduling technology

PCOM Provided Technology

- EMR access
- Network connectivity
- Telephony integration
- Data interfaces or APIs

11. Deliverables as described in submittal instructions

11.1 Proposals must include

- Company history, background, and leadership profiles
- Work plan and implementation timeline
- Organizational and staffing qualifications
- QA and training documentation
- Sample reporting templates and dashboards
- Technology integration descriptions

11.2 Pricing Requirements

Respondents must provide a detailed pricing model including:

Core Services Pricing

- Pricing model (per completed visit, per FTE, etc.)
- Inbound call center services
- Scheduling services
- Automated reminder and outreach services
- Reporting and analytics

Optional Capability Pricing

Respondents must provide separate pricing for the following capabilities if not included in the base service:

- Patient self-scheduling
- Digital patient intake forms
- No-show management workflows
- Outbound recall campaigns
- Patient engagement programs

Implementation Pricing

Respondents must clearly identify all one-time implementation costs, including:

- Implementation fees
- Integration costs
- Training costs
- Data migration or system configuration costs