PEARSON GOVERNMENT SOLUTIONS

Blanket Purchase Agreement Modifications 1 - 28 HSSCCG05A0059 (Old No. 549-02-2)

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	Calvin Lyons, Sr. Co	ontract Administ	rator						
	NCS Pearson	0.14.0.0			-	10A MODIFIC	ATION OF CO	NTRACT	T/ORDER NO.
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	Arlington, VA 22203	3			^	1	(SEE ITEM 17	,	
			CODE			1/17	/2002		
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				OMB Approval 2700-9042
			1. CONTRACT ID CODE	PAGE OF PAGES
AMENDMENT OF SOLI	CITATION/MODIFICATION C	F CONTRACT	DO #591	1 2
AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE	REQ. NO. 5.	PROJECT NO. (II applicable)
#2	6/1/02 & 1/1/2003			
ISSUED BY	CODE 549 / 90C	7. ADMINISTERED BY (# out)	ar than item 6)	CODE
Contracting Officer (90C) VA North Texas Health Care Sys Dallas VA Medical Center, 4500	South Lancaster Ho.	Same as Item		IT OF SOLICITATION NO.
NAME AND ADDRESS OF CONTRACTOR (No. Street, county, State and ZIP, Coda)		(i/) SA. AMENDMEN	I OF OCCIOINATION
Calvin Lyons, Sr. C NCS Pearson 4301 Wilson Blvd., Arlington, VA 2220	contract Administrator Suite 200 3		i i	TION OF CONTRACT/ORDER NO 591 / P.O. E20140
ODE	FACILITY CODE		1/17/2	002
11.	THIS ITEM ONLY APPLIES TO	AMENDMENTS OF	SOLICITATIONS	
7	mended as set forth in Item 14. The hour	and date specified for recei	of Offers [] is exten	nded, []is not extended.
(c) By separate letter or telegram which RECEIVED AT THE PLACE DESIGNA' YOUR OFFER. It by virtue of this amen or letter makes reference to the solicitation 12. ACCOUNTING AND APPROPRIATION DA		PRIOR TO THE HOUR A	AD DATA SPECIFIED MAY may be made by lelegram (Y RESULT IN REJECTION O
New CLINs 25 & 26 to DO	S ITEM APPLIES ONLY TO MO	DIEICATIONS OF CO	NTRACTS/ORDERS	3.
13. THI	SITEM APPLIES ONLY TO MOD MODIFIES THE CONTRACT/OR	DEPINO AS DESCÉ	IBED IN ITEM 14.	•
11 8	O PURSUANT TO: (Specify authority) THE CH	ANGES SET FORTH IN ITEM	4 ARE MADE IN THE CONTR	ACT ORDER NO. IN ITEM 10A.
(N) A THIS CHANGE ORDER IS ISSUE	O PURSONER TO, topocary assurance, meaning			
		A DAMPOTTO ATTUCK ON ANCES	(a) who as channes in peylog offi	ine, appropriation date, etc.) SET
B. THE ABOVE NUMBERED CONTI	RACT/ORDER IS MODIFIED TO REFLECT THE TO THE AUTHORITY OF FAR 43,103(B).	ADMINISTRATIVE OTA-OCO	(man)	
C. THIS SUPPLEMENTAL AGREEN	ENT IS ENTERED INTO PURSUANT TO AUTH	ORITY OF:		
X FAR Part 43 D. OTHER Specify type of modification				
D. OTHER Specify type of modificati	on and authority)			
D. Office space, 1990 - 100 - 100				
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October 1, 2002 DO #591, Modification #2

New features for Appointment Scheduling. Effective date is June 1, 2002.

To provide fingerprint appointments as well as Biometrics scheduling

NCS Pearson shall purchase, modify and integrate COTS software into the Siebel system to allow for fingerprint scheduling and Biometrics scheduling. Purchased software shall become the property of the U.S. Government.

	New CLIN 25	plementation charge	\$107,046		
(b)(4)		& for time	e trade software		\$30,000
. , . ,	And for on-going	maintenance support	as follows:		
	Base period	Option year 1	Option Year 2	Option Year 3	Option Year 4
(b)(4)					

Student Exchange Visitor Hotline. Effective date is on/about January 1, 2003.

The Student Exchange Visitor Hotline will allow students who are overseas and have filed an application with INS to have the capability to call and received limited information. The caller can also notify the INS of the caller's address.

NCS Pearson shall procure local lines, pay monthly costs and develop a screen using the Siebel software to accommodate Government furnished content.

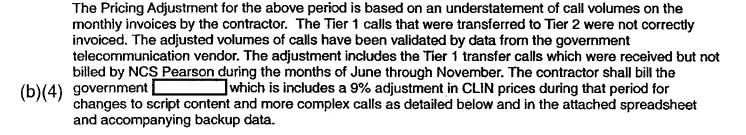
(OTHER DIRECT COSTS EFFECTIVE May 1, 2002)

(b)(4) New CLIN 26	for one time line installation charge \$1,463.00

		18.112			OMB Appro	wai 2700-0042
			1. CONTRACT ID	CODE	PAGE	OF PAGES
AMENDMENT OF SOLICITAT			DO #591		1_	2
2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE RE	Q. NO.	5. PROJ	ECT NO. (#	applicable)
#3	6/1/02					
	549 / 90C	7. ADMINISTERED BY (If other to	-	CODE	<u>- L</u>	
Contracting Officer (90C) VA North Texas Health Care System Dallas VA Medical Center, 4500 South	Lancaster Rd.	Same as Item 6				
Dallas, TX 75216 8. NAME AND ADDRESS OF CONTRACTOR (No. Stree	t, county, State and ZIP: Code)	1	(v) 9A AM	NDMENT OF S	OLICITATIC	IN NO.
•			H			
Calvin Lyons, Sr. Contra NCS Pearson	ct Administrator		9B. DAT	'ED (SEE ITEM	11)	
4301 Wilson Blvd., Suite	200		10A. MC	DDIFICATION O	F CONTRAC	T/ORDER NO.
Arlington, VA 22203			X D	O #591 /	P.O. E	20140
			108. D/	TED (SEE ITEM	l 13)	
CODE	FACILITY CODE		1/1/	17/2002		
11. THIS	ITEM ONLY APPLIES TO	AMENDMENTS OF SC	LICITATION	S		
☐ The above numbered solicitation is amended	as set forth in Item 14. The hour	and date specified for receipt of	Offers []	s extended, [jis not exte	ended.
Offers must acknowledge receipt of this amendme	ent prior to the hour and date spec	ified in the solicitation or as am	ended, by one o	the following	methods:	
(a) By completing Items 8 and 15, and returning of (c) By separate letter or telegram which includ RECEIVED AT THE PLACE DESIGNATED FOR YOUR OFFER. If by virtue of this amendment your letter makes reference to the solicitation and the 12. ACCOUNTING AND APPROPRIATION DATA (# 1992)	les a reference to the solicitation R THE RECEIPT OF OFFERS F Ru desire to change an offer alread is amendment, and is received pri-	n and amendment numbers. PRIOR TO THE HOUR AND I by submitted, such change may	FAILURE OF TOTAL SPECIFIED BY THE PROPERTY OF	YOUR ACKNO D MAY RESI	OWLEDGN ULT IN RE	MENT TO BE
		DECATIONS OF CONT	DACTRION	NEDO.		
	I APPLIES ONLY TO MOD ES THE CONTRACT/ORD					
A THIS CHANGE ORDER IS ISSUED PURSU					DER NO. IN I	ITEM 10A
B. THE ABOVE NUMBERED CONTRACT/ORD	NED IO MODIEIED TO DESI FOT THE	PARTET ATEL CLASSIC CO.		·		
FORTH IN ITEM 14, PURSUANT TO THE A	UTHORITY OF FAR 49.103(b).		ras ulanges ar paj	ин у опис и, арұнс	praisur date	, #E./ SE1
C. THIS SUPPLEMENTAL AGREEMENT IS EN X FAR Part 43	ITERED INTO PURSUANT TO AUTHO	RITY OF:				
D. OTHER Specify type of modification and aut	hority)					······································
	· · · · · · · · · · · · · · · · · · ·			······································		
E. IMPORTANT: Contractor [] is	not, [X] is required to sig	n this document and ret	um <u>one</u>	copies to	th e issui	ing office.
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, in	cluding solicitation/contract subject	matter where feasi	ble.)		
VA North Texas Health Care order for the INS NCSC to inc 30 2002 and 2) Pricing adjust	corporate 1) Pricing a	djustment covering	the period	of June	ove no	oted task ugh Nov.
CC: Nancy Radosta, INS NCSC						
Except at provided herein, all terms and conditions of the	document referenced in Item 9A or 10.	A, as heretofore changed, remains t	inchanged and in f	uli force and effe	ect.	
Calvin Ralyons, Soldist	rest Admin.	Adam Dearing	, Contract			-
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	(214) 857-002 16B. UNITED STATES OF AM			16C. DA	TE SIGNED
Calint: Lights (Signature of person authorized to sign)	//14/03	BY (Signature of C	ontracting Officer	1	1/16	/2003
NSN 7540-01-152-8070	30-	105		JARD FOR	.1 vi 30 (RE)	/ 10-83)
PREVIOUS EDITION UNUSABLE	Computer		Prescrib	ed by GSA CFR) 53.243	., 00 (116)	70 007

January 16, 2003 DO #591, Modification #3

1) Pricing adjustment covering the period of June 1 through Nov. 30, 2002



2) Pricing adjustment effective December 1, 2002 through Option Year 4.

The Pricing Adjustment for handle time is based on the increased call duration due to the changing script content. The revised content added a significant amount of time to the average call handle time. In addition, contractor is handling many more complex calls at the Tier 1 level. The result is a 9% increase in call handle time that statistically dates back to June 2002. The Government has determined that a 9% increase to the monthly unit prices is warranted. Therefore, initial contract CLIN prices are hereby increased by 9% for the period of June 1, 2002 of the Base Year through Option Year 4 as attached.

All other terms and conditions remain unchanged.

		Call Volume Billed	Call Volume that PGS should have billed*	Corresponding CLIN (incl. 9% adj)	PGS invoice Amount**	Difference
(b)(4)	June	324,210	362,116	\$ \$		
	July August	431,181 482,724	464,291 533,160	. 1		
	September	502,012	531,310	\$		
	October	585,993	616,496	\$		
	November	488,001	479,036	\$		
(b)(4)				s		
(b)(4)						
` /\ /						
		L		,		

Base Year Pricing (June 1, 2002 - May 31, 2003) w/9% increase

X 12 months Range of calls persmonth (b)(4) CLIN 1 CLIN 2 300,000 - 319,999 12 320,000 - 339,999 12 CLIN 3 340,000 - 359,999 12 CLIN 4 360,000 - 379,999 12 CLIN 5 380,000 - 399,999 12 CLIN 6 400,000 - 419,999 12 CLIN 7 420,000 - 439,999 12 CLIN 8 440,000 - 459,999 12 CLIN 9 460,000 - 479,999 12 CLIN 10 480,000 - 499,999 12 CLIN 11 500,000 - 519,999 CLIN 12 520,000 - 539,999 12 540,000 - 559,999 CLIN 13 12 CLIN 14 560,000 - 579,999 12 CLIN 15 580,000 - 599,999 12 CLIN 16 600,000 - 619,999 12 CLIN 17 620,000 - 639,999 12 CLIN 18 640,000 - 659,999 12 CLIN 19 660,000 - 679,999 12 CLIN 20 680,000 - 699,999 12 CLIN 21 700,000 - 719,999 12 CLIN 22 720,000 - 739,999 12 12 CLIN 23 740,000 - 759,999 Total Direct Labor: \$35,387,568 \$38,572,449 Estimated Travel/Other Direct Costs: \$10,000 \$38,55,24498 \$10,000 \$10,000

Year 1 Pricing (June 1, 2003 - May 31, 2004) w/9% increase

(b)(4)

ATTENDED TO		(1)); winal Effect Montly	Total w/9%	X12	Total
CLIN 1	300,000 - 319,999			12	
CLIN 2	320,000 - 339,999	 		12	1
CLIN 3	340,000 - 359,999			12	1
CLIN 4	360,000 - 379,999			12	1
CLIN 5	380,000 - 379,999			12	1
	400,000 - 419,999			12	1
CLIN 6				12	1
CLIN 7	420,000 - 439,999			12	1
CLIN 8	440,000 - 459,999			12	4
CLIN 9	460,000 - 479,999			12	-
CLIN 10	480,000 - 499,999				-
CLIN 11	500,000 - 519,999			12	-
CLIN 12	520,000 - 539,999			12	4
CLIN 13	540,000 - 559,999			12	
CLIN 14	560,000 - 579,999	<u> </u>		12	
CLIN 15	580,000 - 599,999			12	1
CLIN 16	600,000 - 619,999			12]
CLIN 17	620,000 - 639,999			12	l
CLIN 18	640,000 - 659,999	•		12]
CLIN 19	660,000 - 679,999			12	<u>.</u>
CLIN 20	680,000 - 699,999			12	
CLIN 21	700,000 - 719,999			12]
CLIN 22	720,000 - 739,999			12]
CLIN 23	740,000 - 759,999			12	
Total Direct Labor:	1	\$32,198,774	\$33,090,004		\$421,159,964
Estimated Travel/Other Direct Costs:		\$12,500	\$12,500		\$12,500

(b)(4)

Year 2 Pricing (June 1, 2004 - May 31, 2005) w/9% increase

A Marine Color	Range of callage of the control of t	A Opprinally Securica (ixed Mortily nelusive)	99/	Total w/9%	X12 months	Total
CLIN 1	330,000 - 351,999					12	
CLIN 2	352,000 - 373,999					12	
CLIN 3	374,000 - 395,999	¥				12	
CLIN 4	396,000 - 417,999					12	
CLIN 5	418,000 - 439,999					12	
CLIN 6	440,000 - 461,999					12 12	
CLIN 7	462,000 - 483,999					12	
CLIN 8	484,000 - 505,999					12	
CLIN 9	506,000 - 527,999					12	
CLIN 10	528,000 - 549,999					12	
CLIN 11	550,000 - 571,999					12	
CLIN 12	572,000 - 593,999					12	
CLIN 13	594,000 - 615,999					12	
CLIN 14	616,000 - 637,999					12	
CLIN 15	638,000 - 659,999					12	
CLIN 16	660,000 - 681,999					12	
LIN 17	682,000 - 703,999	-				12	
LIN 18	704,000 - 725,999					12 12	
LIN 19	726,000 - 747,999					12	
CLIN 20	748,000 - 769,999					12	
CLIN 21	770,000 - 791,999					12	
LIN 22	792,000 - 813,999					12	
CLIN 23	814,000 - 836,999					12	
Total Direct Labor:			\$35,522,489		\$38,719,513 }		\$464,634,13
Estimated Travel/Other Direct Costs:			\$15,625		\$15,625		\$15,62

(B)(4)

Year 3 Pricing (June 1, 2005 - May 31, 2006) w/9% increase

(Fried Montly 1976 | Lotal w/9% X12 | Price (Inclusive) 9% Increase months CLIN 1 363,000 - 387,199 12 CLIN 2 12 387,200 - 411,399 12 CLIN 3 411,400 - 435,599 CLIN 4 439,600 - 459,799 12 12 CLIN 5 459,800 - 483,999 484,000 - 508,199 508,200 - 532,399 12 CLIN 6 12 CLIN 7 12 CLIN 8 532,400 - 556,599 CLIN 9 556,600 - 580,799 12 CLIN 10 580,800 - 604,999 12 12 CLIN 11 605,000 - 629,199 CLIN 12 629,200 - 653,399 12 653,400 - 677,599 12 CLIN 13 12 CLIN 14 677,600 - 701,799 CLIN 15 701,800 - 725,999 12 12 CLIN 16 726,000 - 750,199 12 CLIN 17 750,200 - 774,399 774,400 - 798,599 798,600 - 822,799 CLIN 18 12 CLIN 19 12 822,800 - 846,999 CLIN 20 CLIN 21 847,000 - 871,199 12 CLIN 22 871,200 - 895,399 12 12 CLIN 23 895,400 - 919,600 \$39,277,354 \$19,530 Total Direct Labor: Estimated Travel/Other Direct Costs: \$19,530 \$42,830,846 (\$4.50) \$19,530 \$513,767,320

Year 4 Pricing (June 1, 2006- May 31, 2007) w/9% increase

Range of calls person sopping a little Monthy was Increased increased in the Increase increased in the Incre X 12 months (b)(4) GLIN (b)(4) CLIN I 399,300 - 425,919 12 CLIN 2 425,921 - 452,539 12 452,541 - 479,159 CLIN 3 12 CLIN 4 479,161 - 505,779 12 CLIN 5 505,781 - 532,399 12 CLIN 6 532,401 - 559,019 12 CLIN 7 559,021 - 585,639 12 CLIN 8 585,641 - 612,259 12 CLIN 9 612,261 - 638,879 12 CLIN 10 638,881 - 665,499 12 CLIN 11 665,501 - 692,119 12 CLIN 12 692,121 - 718,739 12 CLIN 13 718,741 - 745,359 12 CLIN 14 745,361 - 771,979 12 CLIN 15 771,981 - 798,599 12 CLIN 16 798,601 - 825,219 12 CLIN 17 825,221 - 851,839 12 CLIN 18 851,840 - 878,459 12 CLIN 19 878,460 - 905,079 12 905,080 - 931,699 CLIN 20 12 CLIN 21 931,700 - 958,319 12 CLIN 22 958,320 - 984,939 12 CLIN 23 984,940 - 1011,560 12 Total Direct Labor: \$43,698,188 Estimated Travel/Other Direct Costs: \$24,414 548,227,6870 (1997) \$24,414 \$24,414

	ICITATION/MODIFICATION	N OF CONTRACT	1 CONTRACT ID CODE	PAGE OF PAG
2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE	DO #591	1 2
#4	05/01/03	" TOO OIGH TO TO THE PARTY OF T	neu, NO.	S. PROJECT NO. (If spokcable)
6. ISSUED BY	CODE 549 / 90C	7. ADMINISTERED BY (If other	dibandan Si	
Contracting Officer (90C)				CODE
VA North Texas Health Care Sy.	stem	Same as Item	p.	
Dallas VA Medical Center, 4500 Dallas, TX 75216	South Lancaster Ad.			
B. NAME AND ADDRESS OF CONTRACTOR	No. Street, county, State and 719: Code)	<u>L</u>		
·	, and the same same same same same same same sam		(N) SA. AMENDMEN	NT OF SOLICITATION NO.
Calvio Lyone Sr C	ontract Administrator			_
NCS Pearson	Omract Administrator		98. DATED (SE	E (TEM 11)
4301 Wilson Blvd	Cultin DOG		LLL.	
			10A MODIFICA	TION OF CONTRACT/ORDER
Arlington, VA 22203	3		1 1	591 / P.O. E20140
CODE			10B. DATED (SI	EE ITEM 13)
	FACILITY CODE		1/47/0	
11.	THIS ITEM ONLY APPLIES TO	O AMENDMENTS OF SO	MICHATIONO	<u>002</u>
Ine above numbered solicitation is an	nended as set forth in Item 14. The hou	- selector of believes step but it	4 O#	
THE SULP OF THE STREET PROPERTY OF THE PLANT IN THE PLANT	nendment prior to the hour and date see	orified in the collaboration as as a		ded, []Is not extended,
a) By completing Items 8 and 15, and retu c) By separate letter or telegram which	Iming one (1) rony at the manufacture	Crypton at the Policipaliby of \$8.5%	nended, by one of the folio	owing melhoda:
c) By separate letter or telegram which RECEIVED AT THE PLACE DESIGNATE	includes a reference to the solicitati	(0) by actinowledging receipt of	this amendment on each	copy of the offer automitted
OUR OFFER. If by virtue of this amendo	ED FOR THE RECEIPT OF OFFERS	PRIOR TO THE HOUR AND	DATA SPECIFIED MAY	
r letter makes reference to the solicitation	and this amendment and it constrains	ady submitted, such change may	be made by telegram or	letter, provided each telepro
2. ACCOUNTING AND APPROPRIATION DATA	A (If required)	and to me opening hour and date	a specified.	
CLIN No. 27 for \$49,858 to				
IT MC	ITEM APPLIES ONLY TO MO	DIFICATIONS OF CONT	RACTS/ORDERS.	
11 141	/VICIED THE CUNTRACT/DR	IDEA NO AS DESCRIPT	The the Community of th	
MIS CHANGE ONDER IS ISSUED F	PURSUANT TO: (Specify suthority) THE CH	langes set foath in Item 14 af	E MADE IN THE CONTRAC	T OFFIDER NO. IN ITEM 104
į				
THE ABOVE NUMBERED CONTRACT FORTH IN ITEM 14 BURBLINGS FORTH IN ITEM 14 BURBLIN	OT/ORDER IS MODIFIED TO REFLECT THE THE AUTHORITY OF FAR 43,103(b).	ADMINISTRATIVE CHANGES (SUC)	Ax changes in online . K.	
C. THIS SUPPLEMENTAL AGREEMENT	THE AUTHORITY OF FAR 43.103(b). T IS ENTERED INTO PURSUANT TO AUTH			RODFOOTIALION date, etc.) SET
X FAR Part 43	IS ENTERED IN TO PUNSUANT TO AUTH	ORITY OF;		
D. OTHER Specify type of modification a	and authority)			
. IMPORTANT: Contractor [lis not [X lie required to sig	و و المالية	100	
 _ •] is not, [X] is required to sig	In this document and retu	copie	s to the issuing office.
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L DESCRIPTION OF AMENDMENT/MODIFICAL VA North Texas Health Ca order for the INS NCSC to CC: Nancy Radosta, INS NC CC: Nancy Radosta, INS NC Cept at provided herein, all terms and conditions and conditions of the NAME AND TITLE OF SIGNER (Type or all vio R. Lyons, Sr. Contract	TION (Organized by UCF section headings, in are System and NCS Per incorporate the Interim A incorporate the Interim 9A or 10A in print) 15 Administrator 15 C. Date Signed	earson, hereby agre Appointment Schedu As hardolore changed, remains un 16A. NAME AND TITLE OF COT Adam Dearing.	changed and in full force and NTRACTING OFFICER (I	above noted tas
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CC: Nancy Radosta, INS NC CC: Nancy Radosta, INS NC CA NAME AND TITLE OF SIGNER (Type or all vin R Lyons Sr Contracts), CONTRACTOROFFERDA	TION (Organized by UCF section headings, in are System and NCS Per incorporate the Interim A incorporate the Interim 9A or 10A incorporate the Interim A incorporate the Interim 9A or 10A incorporate the Interim 9A incorp	as hardolore changed, remains uniformed to the control of the cont	changed and in full force and NTRACTING OFFICER (I	d effect. Type or prim) ficer
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12

May 1, 2003 DO #591, Modification #4

Interim Appointment Scheduler support. Effective date is May 01, 2003. NCS Pearson will provide the required services per the attached contract change proposal dated 05/30/03.

The purpose of this modification is to provide funding to support the above Interim Appointment Scheduler requirements under the subject National Customer Service Center (NCSC) contract. The estimated Time & Material charge of \$49,858 includes labor cost of \$12,206, NCS Pearson staff End-User Training price of and TimeTrade Licenses price of \$23,575. NCS Pearson's 05/30/03 proposal is hereby incorporated as attached.

The new total for CLIN 27 is hereby increased from \$335,130 by \$49,858 to \$384,988.

PAGE WITHHELD PURSUANT TO (b)(4)

Executive/Price Proposal for Interim Appointment Scheduler

Prepared in response to:

Request from the Bureau of Citizenship and Immigration Services (BCIS)

Best "Reproducible" Copy Available

Fresented to

Adam Dealing, Contracting Officer
Department of Veletan's Affalts
North Texas Medius are System
data South Langage 17,020
Dellas, Texas 752 ha

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1/6y/8052003

NCS Pearson

contact is awarded for this primate as a result of the contact is awarded this proposate proposa

II. Interim Appointment Scheduler Pricing Assumptions

- 1. This proposal is for the development of the NCSC system functionality that enables Interim Appointment Scheduler.
- BCIS requires an interim appointment scheduling system to assist with requirements caused by national Code Orange and Code Red security alerts.

(b)(4) 3. 4. 5. 6.

- The Interim Appointment Scheduler project will be implemented across all four Tier 1 sites (Arlington, VA; Corbin, KY; Lawrence, KS; and Phoenix, AZ).
- 8. No additional hardware will be required. Calls will be routed down existing T-1 lines.
- 9. Based on the duration of the calls associated with this project, Pearson Government Solutions anticipates that the Average Handle Time (AHT) of the associated calls will be no longer than the AHT of the existing calls. If the calls are found to increase our AHT, Pearson Government Solutions will notify BCIS and submit a change proposal to reflect the increase in AHT.
- 10. A list of questions was sent to BCIS on May 19, 2003. These questions outlined additional information that Pearson Government Solutions required before any work could begin. Some of these questions have already been answered, some require further clarification, and others have not yet been answered. The list includes the entire historical string for each question. Since the project duration is very short, a response to these answers is required from BCIS, before Pearson Government Solutions can complete the project. Work can be completed for those appointments and locations where complete information is available and has been provided to Pearson. The rest will be completed, in phases, when required information is provided by BCIS.
- 11. This is a T&M project, not a fixed bid. The enclosed price is an estimated cost to provide services as described in Section IV Interim Appointment Scheduler. It is based on all required information being available at the

- time development commenced. Phased completion <u>may</u> increase development costs by some increment.
- 12. Since there is no IVR option to identify Interim Appointment Scheduler calls, Pearson Government Solutions will not be able to specifically report on these types of calls.
- 13.BCIS COTR will provide a single point of contact for all project related issues upon execution of the contract modification.
- 14. BCIS will train the trainers.
 - a. Trainers will be trained via conference call
 - Pearson Government Solutions trainers will train 550 CSRs across all four sites (VA, KY, KS, and AZ) for the Interim Appointment Scheduler.
- 15. The call center will operate Monday through Friday from 8am 9pm Eastern Standard Time.
- 16. There will be Call Center Supervisors available at all times that the Interim Appointment Scheduler lines are open for calls.
- 17. Call Center Supervisors are responsible for supervising, call monitoring, and scheduling activities.
- 18. Pearson Government Solutions will inform BCIS of issues and/or major occurrences within 4 business hours.
- 19. The CSRs handling Interim Appointment Scheduler callers will use English or Spanish.
- 20. Interim Appointment Scheduler call volume is estimated to be 250,000 calls per month.
- 21. The period of performance for Interim Appointment Scheduler calls will be the following option years:
 - Option Year 1 June 1, 2003 through May 31, 2004
 - Option Year 2 June 1, 2004 through May 31, 2005
 - Option Year 3 June 1, 2005 through May 31, 2006
 - Option Year 4

 June 1, 2006 through May 31, 2007
- 22.A security compliant user id and password combination will be used for access to the system. Both changing of password and adding of password will be provided. All security issues will be in compliance with USDOJ Instruction 2640.2D requirements. Moreover, Pearson Government Solutions will adhere to OIRM security instructions on all security concerns. If under the Department of Homeland Security, security requirements change, Pearson Government Solutions will adhere to such changes and pass the price of such required changes to BCIS via contract change modification.
- 23. BCIS will provide Pearson Government Solutions with the scripts, and CSRs will access the scripts to answer Interim Appointment Scheduler calls.
- 24 Without the IVR changes, it is also understood that customers calling will not have a specific selection to make, and might select any IVR option simply to get to a live CSR. This may cause confusion for BCIS

- customers, and may also potentially cause an increase in AHT because CSRs must ask probing questions to determine the reason for the call.
- 25. The CSR will screen the customer calling in to determine whether an appointment needs to be made, and/ or whether they can help them with any other requests. If an appointment is to be made, the appointment will be made in the Time commerce application. This is the application that some ASC offices currently utilize to login to view their manifests for the day.
- 26. Local offices will be able to login in and view their manifests.
- 27. Should call volumes associated with implementing changes in appointment scheduling spike significantly above projected volumes due to Code Orange or Code Red, causing Pearson Government Solutions to be unable to handle any calls offered, incentive/disincentives relating to Average Handle Time (AHT) and Call Abandoned Rate will be suspended for the duration of the alert.
- 28. Training of BCIS local office staff has not been considered in this proposal. BCIS will receive a soft copy of the training curriculum.
- 29.A Customer Requirements Document has also been enclosed with this proposal. Pearson Government Solutions requires a sign off on this document before Pearson Government Solutions can begin any work. In this instance, the CRD is a living document that defines Pearson Government Solutions' understanding of the current BCIS requirements. The CRD will be modified as information not currently available is provided. The document will continue to be a vehicle of communication between Pearson Government Solutions and BCIS.
- 30. Upon government acceptance of Contractors proposal, it will be incorporated into the subsequent modification.
- 31. All existing terms and conditions of the current contract remain unchanged with the exception of the above assumptions.

III. Interim Appointment Scheduler Pricing Details

This is a T&M project, not a fixed bid. The enclosed price of \$49,858 is an estimated cost to provide services and deliver items described in Section IV. Interim Appointment Scheduler. It is based on all required information being available at the time development commenced. Phased completion <u>may</u> increase development costs by some increment.

See attachment for Pricing Estimates.

IV. Interim Appointment Scheduler

Deliverables*	Description
Customer Requirements Document	Document detailing customer
	requirements is based on approved
	requirements provided by BCIS.
Training & Training curriculum	Pearson Government Solutions Call
	Center Trainers ready to train the
	CSRs.
Phased Delivery for Interim	Each phase of the project is complete
Appointment Scheduler Initiative	after successful execution of the
	following test case:
	Test calls will be made
	into Pearson Government
	Solutions' Tier 1 call
•	center.
	Callers will request an
	appointment with a BCIS
	local office.
	Request will be
	processed through Siebel
	by CSR capturing
	customer data.
	4. Siebel will launch Time
	Commerce application to
	check appointment
	availability and for CSR to
	confirm the appointment.
	5. Local Office
	Representatives will be
	able to login and view their manifests for the
	appointments made.

Note: * Deliverables are contingent on receipt of requirements from BCIS

Pearson Government Solutions T&M Proposal for BCIS Interim Appointment Scheduler May 30, 2003 BPA #: 549-02-2

	Development	Hours	GSA ID	GSA Title	Discounted GSA Rate	Price
(b)(4)	Project Management Analysis & Test Genesys Software Engineer Siebel Developer Time Commer:e IVR Engineer Telephony Engineer		GSD019 GSD019 GSD019 GSD019 GSD019	Senior Program Mgr. Senior Software Developer Software Developer	S S S S S S S S S S S S S S S S S S S	\$ 12,206
(b)(4)	End-User Training Trainer CSR NCS staff End-User Training Total			Assoc. Customer Service Rep Correspondence	\$ \$	\$ 14,077
	Software TimeTrade Licenses Software Total GRAND TOTAL					\$ 23,575 \$ 23,575 \$ 49,858

Contract Modification Proposal for Interim Appointment Scheduler

Prepared in response to:

Request from the Bureau of Citizenship and Immigration Services (BCIS)

Best "Reproducible" Copy Available

Presentedito

Asian Dealing Contrateling Officer
Department of Veteral's Affairs
Notin Texas Healtheare System
4500 South Lancasid Trock
Dallas, Texas 75216

Nancy Regosia: BOIS COTTA Buteau of Cruzenship and Immigration Service. Repairment of Homeland Security. 1899 K Street NW: Troom 2010. Washington, 13.0: 2013/8-1991

Submitted by

NGS Pearson Inc 4301 Wilson Blvd Suite 200 Arlington VA 22203

Contract No. GS35F4650G/BPA549022

May 20, 2002

NCS Pearson

The proposal motives data that shall not be disclosed outside that U.S. Government and shall not be displicated used or disclosed—in which of in part—for any piriposal other than to evaluate this proposal. If however, it contact is awarded to this orient as a result of—or in connection with—the submission of this detail the government shall have the ingrit to duplicate, use; or disclose the data to the extent provided in the resoluted conflicts. This restriction does not limit the government's right to use information contained in this data in it is obtained from another source without restriction. The data subject to this restriction are contained in sheets identified on the page(s) marked with a restrictive legend.

Section 1.0 Background

The Interim Appointment Scheduler is an enhancement to the Pearson Government Solutions call center program for the Bureau of Citizenship and Immigration Services (BCIS).

The Interim Appointment Scheduler will implement a temporary technical solution intended to reduce customers standing in line outside BCIS offices waiting for service. This change in policy is for the protection of the customers during the Department of Homeland Security declaration of 'Code Orange' security status. This implementation will allow BCIS customers to schedule appointments at specified BCIS local offices for certain appointment types.

(b)(4)			
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Calls will be handled by all CSRs located at each of the four call sites.

Section 2.0 Purpose

This document contains a conceptual approach to providing a technical solution to the business need currently facing the BCIS for systematically processing the Interim Appointment Scheduler calls.

This document also contains a proposal to provide the Pearson Government Solutions Program team with project information regarding timelines and level of effort regarding a technical solution to the business need currently facing the BCIS.

Both the conceptual approach and the proposal were formulated based on requirements provided by BCIS and on emails exchanged between BCIS and Pearson Government Solutions to clarify the requirements.

Section 3.0 Overview

This document is divided into the following areas:

- Interim Appointment Scheduler Overview Description
- Training
- Assumptions

	Section 4.0 Interim Appointment Scheduler Overview Description			
(b)(4)		The state of the s	, , , , , , , , , , , , , , , , , , , ,	

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Section 5.0 Training

Training is an important and integral part of the success of this initiative. The actual training of users will occur during the week prior to implementation of the functionality into production. All Pearson Government Solutions CSRs at each of the four call sites will be trained by Pearson Government Solutions Trainers. All training is available in the training room (at each site) which CSRs have access to.

Training for new hires at each of the call sites will be incorporated into the regular initial BCIS CSR training.

Section 6.0 Assumptions

Please refer to Assumptions in the Executive/Price Proposal.

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B. THE ABOVE NUMBERED CONTRACT FORTH IN ITEM 14, PURSUANT TO 1	TAORDER IS MODIFIED TO REFLECT THE THE AUTHORITY OF FAR 43.103(b).	ADMINISTRATIVE CHANGES (such	as changes in paying offi	ce, appropriation date	e, etc.) SET
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D. OTHER Specify type of modification ar	nd authority)				
	,				
IMPORTANT: Contractor []	X] is not, [] is required to sign	on this document and not			
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May 31, 2004, of the above	e noted task order		,	, oug,,	
Maria I Per a la companya di Amerika di Amer					
No additional funds are add	ded to the above task or	der at this time.			
CC: Nancy L. Radosta					
- o. Honey L. Nauosia					
		*			
ept at provided herein, all terms and conditions on NAME AND TITLE OF SIGNER (Type or	of the document referenced in Item 9A or 10/	A, as heretofore changed, remains unc	hanged and in full force	and effect.	
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Contracting Officer (90C)	ODE 549790C	-1	•	CODE	
VA North Texas Health Care System		Same as Item 6)		
Dallas VA Medical Center, 4500 South	Lancaster Rd.				
Dallas, TX 75216 8. NAME AND ADDRESS OF CONTRACTOR (No. Stree	at county State and 7/P: Code)	<u> </u>	Ti a las augusti	EUT OF DOLLAR	
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CC: Nancy Radosta, INS NCSC					
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Except at provided herein, all terms and conditions of the c	document referenced in Item 9A or 10A,	as heretofore changed, remains ur	ochanged and in full force	and effect.	
15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CO	NTRACTING OFFICER	(Type or print)	
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Calvin B Lyons Sr Contract Ad 15B. CONTRACTOR/OFFEROR		(214) 857-0029	a		
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April 28, 2003 DO #591, Modification #6

New features for the Employer, Business, Investor, and School Services (EBISS). Effective date is April 28, 2003.

NCS Pearson will provide the required services per the attached contract change proposal to support Employer, Business, Investor, and School Services (EBISS).

The new CLIN 27 will henceforth be used for miscellaneous requirements in support of the subject National Customer Service Center (NCSC) contract. All future charges pursuit to this CLIN will be added incrementally to the initial CLIN amount of \$91,747. NCS Pearson's 4/14/03 proposal is hereby incorporated as attached.

New CLIN 27 for one time software development charge\$32,170 and training costing of \$59,577

NCS Pearson will track the subject calls separately from the existing calls for an assessment period of 90 day from the contract modification effective date. Modification #6 period of performance is April 28, 2003, through July 31, 2003.

Based on the data available on day 55 (on/about June 23, 2003)of the 90 day assessment period, NCS Pearson will submit a proposal to incorporate the subject calls into the existing CLIN structure.

(b)(4)

Dearing, Adam C.

From: Lyons, Calvin [Calvin.Lyons@pearson.com]

Sent: Thursday, May 29, 2003 9:02 AM

To: 'adam.dearing@med.va.gov'; 'Nancy.L.Radosta@usdoj.gov'; 'Michael.Aytes@usdoj.gov';

'Bob.Kennard@usdoj.gov'

Cc: Brattlie, Henry

Subject: RE: EBISS adjustment to projected monthly call volumes

Hello,

Due to a finding by NCS Pearson that the average EBISS call handle times is less than the originally projected length, the proposed not to exceed monthly call volumes is hereby changed from 5,000 calls to 7,500 calls at no additional cost to the government.

Calvin R. Lyons
Sr. Contract Administrator
NCS Pearson
Direct No. 703-284-5624
Fax 703-284-5628
E-mail calvin.lyons@pearson.com
www.ncs.com

This email may contain confidential material.

It is email may contain confidential material. If you were not an intended recipient, Please notify the sender and delete all copies. We may monitor email to and from our network.

Offeror Name: Pearson Government Solutions Base Year Pricing (June 1, 2002 - May 31, 2003) w/EBISS Revised X 12 Range of calls per month | Monthly Unit EBISS Monthly Unit months Total EBISS Training N/A EBISS Software Development N/A CLIN 1 300,000 - 319,999 CLIN 2 320,000 - 339,999 CLIN 3 340,000 - 359,999 CLIN 4 360,000 - 379,999 CLIN 5 380,000 - 399,999 CLIN 6 400,000 - 419,999 CLIN 7 420,000 - 439,999 CLIN 8 440,000 - 459,999 460,000 - 479,999 CLIN 9 CLIN 10 480,000 - 499,999 CLIN 11 500,000 - 519,999 CLIN 12 520,000 - 539,999 CLIN 13 540,000 - 559,999 CLIN 14 560,000 - 579,999 CLIN 15 580,000 - 599,999 CLIN 16 600,000 - 619,999 CLIN 17 620,000 - 639,999 CLIN 18 640,000 - 659,999 CLIN 19 660,000 - 679,999 CLIN 20 680,000 - 699,999 CLIN 21 700,000 - 719,999 CLIN 22 720,000 - 739,999 CLIN 23 740,000 - 759,999 Total Direct Labor: Estimated Travel/Other Direct Costs: \$10,000 \$10,000 Total for Base Year: \$38,582,449 \$471,137,762

(b)(4)

Pearson Government Solutions Offeror Name: Year 1 Pricing (June 1, 2003 - May 31, 2004) w/EBISS increase Original Fixed Montly Revised CLN **EBISS** Range of calls per month Price (inclusive) months CLIN 1 300,000 - 319,999 12 CLIN 2 320,000 - 339,999 12 CLIN 3 340,000 - 359,999 12 CLIN 4 360,000 - 379,999 12 CLIN 5 380,000 - 399,999 12 CLIN 6 400,000 - 419,999 12 CLIN 7 420,000 - 439,999 12 CLIN 8 440,000 - 459,999 12 CLIN 9 460,000 - 479,999 12 CLIN 10 480,000 - 499,999 12 CLIN 11 500,000 - 519,999 12 CLIN 12 520,000 - 539,999 12 CLIN 13 540,000 - 559,999 12 CLIN 14 560,000 - 579,999 12 CLIN 15 580,000 - 599,999 12 CLIN 16 600,000 - 619,999 12 CLIN 17 620,000 - 639,999 12 CLIN 18 640,000 - 659,999 12 CLIN 19 660,000 - 679,999 12 680,000 - 699,999 CLIN 20 12 CLIN 21 700,000 - 719,999 12 CLIN 22 720,000 - 739,999 12 CLIN 23 740,000 - 759,999 12

\$35,096,664

\$35,109,164

\$12,500

\$364,350

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Total Direct Labor:

Total for Base Year:

Estimated Travel/Other Direct Costs:

\$12,500

\$429,552,517

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VA North Texas Health Corder for the INS NCSC in	support to the addition	earson, hereby agre	e to modify the	above noted task
order for the INS NCSC in	support to the additional	I staffing requiremen	nts.	
CC: Nancy Radosta, INS NO	ren			
Tally Hadosta, 1145 NE	/SU			
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May 1, 2003 DO #591, Modification #7

Additional staffing requirements support. Effective date is May 01, 2003. NCS Pearson will provide the required services per the attached contract change proposal dated 05/29/03.

The purpose of this modification is to provide funding to support the additional staffing requirements under the subject National Customer Service Center (NCSC) contract. The one time charge of \$109,755 is hereby approved. NCS Pearson's 05/29/03 proposal is hereby incorporated as attached.

The new total for CLIN 27 is hereby increased from \$384,988 by \$109,755 to \$494,743.

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(b)(4) Per Day, Per Cleared CSR

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(b)(4) Per Day, Per Cleared CSR

(b)(4)

Location Start Date Clearance Date: Total Days Total Employee Last First of Compensation Dollars 6] (b)(4)\$ 109,755 Dollars \$

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- 1.) In accordance with section 3.7.6 Phase-In Plan, the new Government guaranteed call volume for billing purposes is hereby increased to CLIN 11 for call volumes 500,000-519,999 which accommodates the expansion of the Service Center Calls with Referrals and Change of Address (COA). Upon activation of the Interim Appointment Schedulers and Appointment Scheduling, E-Filing, Appointments and expansion of ASC scheduling to all I-90 renewals, the Government guaranteed call volume for billing purposes is anticipated to increase to CLIN 20 for call volumes 680,000-699,999.
- 2.) Due to the incorporation of new scripts and until content is stabilized, the Average Handle Time (AHT) for June and July is increased to 4.8666 minutes per call.
- 3.) In accordance with NCS Pearson' attached and incorporated contract change proposal dated 07/16/03, the accepted finding and proposed assumptions of the Employer, Business, Investor, and School Services (EBISS) 55 day of the 90 day assessment period are hereby incorporated. Effective June 1, 2003, EBISS calls will be included as normal calls within the CLIN pricing structure, EBISS CSR's will be multiskilled to answer other call types but EBISS calls will be given first priority and EBISS Incentive/Disincentives will be waived through June 30, 2003.

All other terms and conditions of the subject contract remain unchanged.

Contract Modification Proposal for

Employer, Business, Investor, and School Services (EBISS) 55 Day Review of Performance

Prepared in response to:

Request from the Bureau of Citizenship and Immigration Services (BCIS)

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July 16, 2003

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	Assessment of Call Performance	
	EBISS Pricing Details	



Section 1.0 Background

The Employer, Business, Investor, and School Services (EBISS) initiative is an enhancement to the NCS Pearson call center program for the Bureau of Citizenship and Immigration Services (BCIS).

This service provides:

- Information to employers about employment eligibility,
- · Information to employers about hiring foreign workers,
- Information to investors who want to immigrate based on a direct investment in a U.S. business,
- And information to schools regarding the enrollment of foreign students.

When a customer calls the NCSC toll free number, 1-800-375-2099, the call is first routed to the network base IVR. The EBISS calls are routed only to trained EBISS specialists in Corbin, KY. Employers investors or schools who want to know about a specific application which an employee or student may have filed with BCIS are re-directed to call the National Customer Service Center's general toll free number at 1-800-375-5283. Callers who are not employers, investors or school officials are also advised of the purpose of this hotline and are re-directed to the general information line at 1-800-375-5283. The EBISS scripts are incorporated into the BCIS Information Reference System (IRS). The majority of the callers receive answers to their questions with the initial phone call. Calls received for which scripted information is not provided will be transferred to Tier 2 sites until NCS Pearson receives new scripted material from BCIS.

Section 2.0 Purpose

The purpose of this document is to provide BCIS with assessment results for EBISS call performance as of day 55 of the 90 day assessment period.

Section 3.0 Overview

This document is divided into the following areas:

- EBISS Processing Overview Description
- Assumptions
- Assessment of Call Performance
- EBISS Pricing Details



	Section 4.0 EBISS Processing Overview Description	
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Section 5.0 Assumptions

Note: Updates/changes to the original assumptions are shaded in gray.

- 1. This proposal is for the development of the system for the EBISS.
- 2. Since this estimate is based on the Customer Requirements Document, any changes to the requirements will impact this estimate.
- 3. The project will be implemented in Corbin, KY call center only.
- No additional hardware will be required. Calls will be routed down existing T-1 lines.
- 5. A new skill set will be created for these call types.
- 6. Existing announcements and call treatment will continue to be utilized.
- 7. There are no special requirements for reporting

8.

- BCIS will provide a single point of contact (and an alternate POC) for submission of questions and resolution of project issues by the COTR within 5 days of contract modification.
- 10. The EBISS initiative will be in place within 24 hours of contract modification execution.
- 11.BCIS will provide training and documentation for the EBISS call center Customer Service Representatives (CSRs) in Corbin, KY.
 - There will be two training sessions. First week of training 3/10/03 through 3/14/03, and second portion of training will be 3/17/03 through 3/25/03.
 - Training will be held twice a year to account for attrition, or as needed.
- 12. The call center will operate Monday through Friday from 8am 9pm Eastern Standard Time.
- 13. Pearson will train 11 EBISS CSRs and 2 Supervisors in Corbin, KY. Sufficient trained CSRs will be assigned to answer EBISS calls daily.
- 14. There will be a Call Center Supervisor available at all times that the EBISS line is open for calls.
- 15. Call Center Supervisors are responsible for supervising, call monitoring, and scheduling activities.
- 16.NCS Pearson will monitor two calls per day per CSR.
- 17. NCS Pearson will inform BCIS of issues and/or major occurrences within 4 business hours.
- 18. The CSRs assigned to handle EBISS callers will use English only.
- 19. The volume estimate for base year is 10,000 calls and 60,000 for each Option Years 1 through 4.
 - Base Period April 2003 through May 31, 2003
 - Option Year 1 June 1, 2003 through May 31, 2004
 - Option Year 2 June 1, 2004 through May 31, 2005



Option Year 3 – June 1, 2005 through May 31, 2006

 Option Year 4 – June 1, 2006 through May 31, 20 	2007
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- 22. A security compliant user id and password combination will be used for access to the system. Both changing of password and adding of password will be provided. All security issues will be in compliance with USDOJ Instruction 2640.2D requirements. Moreover, NCS Pearson will adhere to OIRM security instructions on all security concerns. If under the Department of Homeland Security, security requirements change, NCS Pearson will adhere to such changes and pass the price of such required changes to BCIS via contract change modification.
- 23. The EBISS CSRs will access a separate script for calls from an employer. business, investor and schools. The scripts will be provided by BCIS.
- 24. The EBISS scripts that the EBISS CSRs will refer to will be available in the BCIS Information Reference System (IRS), and they will be password protected so not all CSRs will access them. Only the EBISS specialists in Corbin, KY will have access to open these documents (EBISS scripts).
- 25. The purpose of the EBISS service is for EBISS CSRs to provide information to employers, businesses, investors, and schools about how to meet their responsibilities under the immigration laws of the United States. including how to bring foreign workers to the United States or obtain status for employees that are already here. EBISS CSRs will only provide assistance to callers with EBISS related questions or concerns.
 - Employers investors or schools who want to know about a specific application which an employee or student may have filed with BCIS will be re-directed to call the National Customer Service Center's at 1-800-375-5383
 - Callers who are not employers, investors or school officials will also be advised of the purpose of this hotline and be re-directed to the general information line at 1-800-375-5283.
- 26. Development will be completed in the base period of the EBISS program. There will be no development related tasks in year 1 through year 4.
 - Year 1 through 4 costs will be maintenance only to ensure that the program continues as designed for year one. Any development or program changes for year 1 through year 4 requested by BCIS will be priced and billed separately.
- 27. NCS Pearson management will monitor average handle time on a daily basis and we will assess the handle time periodically to see if changes warrant contacting BCIS to discuss possible changes to the handle time assumptions.



- Average handle time will not exceed 7.63 minutes per call. The current experienced average handle time is 5.00 minutes per call.
- For the period May 1, 2003 through May 31, 2003, it is estimated that the EBISS team will handle 375 calls per day. Call volume will not exceed 7,500 calls during any month. If call volumes exceeds 7,500 calls during any month, NCS Pearson will request a meeting with BCIS to renegotiate the enclosed prices.
- NCS Pearson will track the EBISS calls separately from the existing calls through May 31, 2003. On day 55 of the 90 days period, NCS Pearson will provide an assessment of call performance to BCIS which will include quality and talk time.
- Incentive/Disincentives for EBISS will be waived through June 30, 2003 to stabilize content.
- 28. Effective June1, 2003, calls will be included as normal calls within the CLIN pricing structure.
- 29. When incentive/disincentives for EBISS calls commence, they will be treated as a normal call and included in the total calls handled.
- 30. EBISS CSRs will be multi-skilled to answer other call types but EBISS calls will be given first priority.
- 31. All existing terms and conditions of the current contract remain unchanged with the exception of the above assumptions.



Section 6.0 Assessment of Call Performance

As stated in the April 14, 2003 contract modification submitted to BCIS, NCS Pearson management will monitor and track EBISS calls separately from the existing calls for an assessment period of 90 days from the contract modification effective date. This assessment is based on the data available on day 55 (June 23, 2003) of the 90 day assessment period. It also includes quality and talk time. During this assessment period, the personnel assigned to EBISS calls only handled EBISS calls and were not allowed to handle calls from the main 1-800 number.

Per BCIS, EBISS call volume was estimated not to exceed 7,500 calls during any month, and the average handle time was estimated not to exceed 7.63 minutes per call. However, due to a finding by NCS Pearson that the average EBISS call handle time was less than the original projected length; the monthly call volume was changed from 5,000 calls to 7,500 calls at no additional cost to BCIS on May 29, 2003. Based on NCS Pearson's assessment, EBISS call volume for the first 55 days (April 28 through June 11) is 9417 calls with an average handle time of 5.00 minutes per call. The call volume for the month of May was 6124 with an average handle time of 4.37 minutes per call. The call volume is within the estimated call volume of 7,500 calls per month. However, the average handle time is lower than the estimated 7.63 minutes per call.

NCS Pearson credits the overall low average handle time to the productivity and efficiency of their experienced CSRs answering EBISS calls. All EBISS CSRs are Information Specialist III.

These experienced CSRs are familiar with the BCIS process and can handle any BCIS call with ease in a shorter amount of time than any other CSR.

The next several pages provide reports and charts from the CMS system about the following from the beginning (April 28, 2003) of EBISS calls to June 11, 2003:

- Total ACD Calls
- Average Calls per Day
- Average Handle Time
- Average Speed of Answer

You will notice in figure 4 (the average handle time chart) that the average handle time was stable within the first three weeks. However, it increased significantly from 4.18 minutes in week 3, to 4.39 minutes in week 4, then 5.03 minutes in week 5.

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Weekly EBISS Statistics

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99.68% May Overall Quality Average



Figure 1: EBISS Calls Handled and Average Handle Time



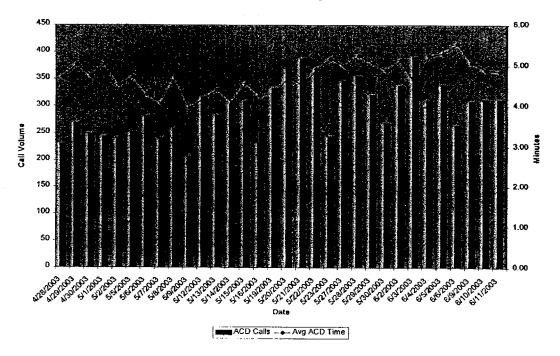


Figure 2: Total ACD Calls - Total Automatic Call Distribution.

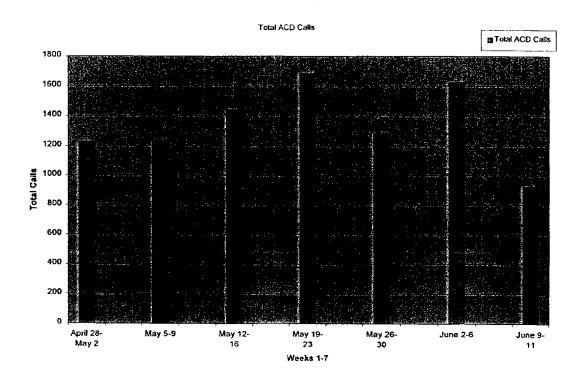


Figure 3: Average Calls per Day

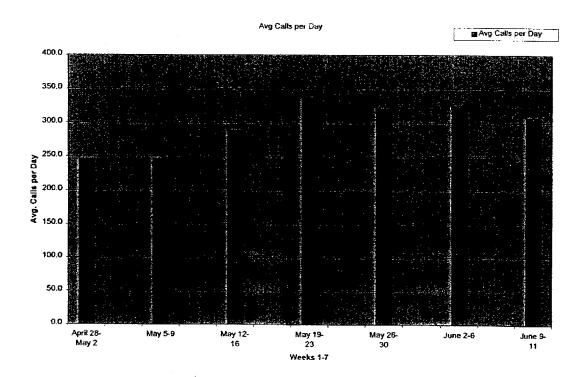




Figure 4: Average Talk Time - Average Handle Time

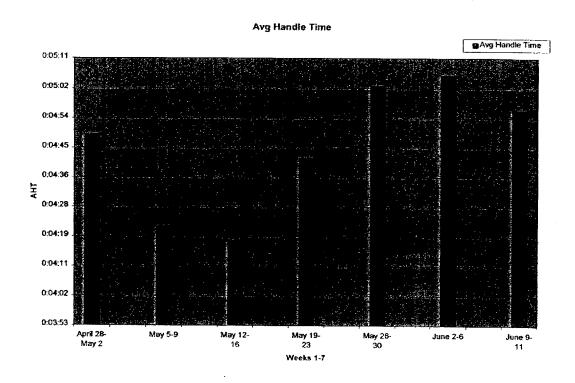
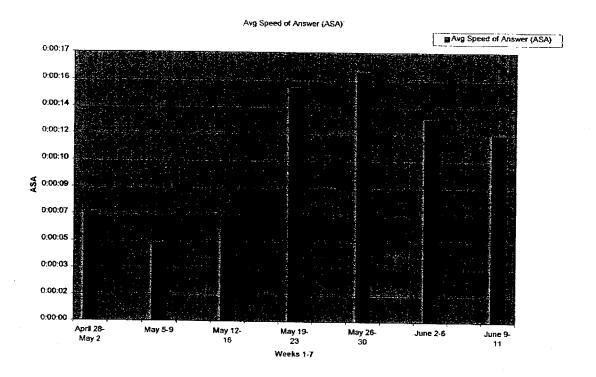




Figure 5: Average Speed of Answer (ASA)





Section 7.0 EBISS Pricing Details

Pricing for EBISS Calls for the period beginning June 1, 2003

Description

Effective June 1, 2003, NCS Pearson agrees to consider EBISS calls as normal calls to be counted and measured within the negotiated CLIN structure. The separate measurement and payment for EBISS calls will terminate with the May billing.

Cost for New EBISS Announcement Message

Description

A separate greeting message specific to EBISS was recorded at the announcement board in the switch. Additional programming was performed to route the EBISS calls to this different greeting. Prior to that, all the EBISS calls that reached the switch would receive the same call treatment and messages that all the other NCSC calls would receive. The existing estimated wait time message for callers that are on hold was also incorporated as part of this.

Cost for establishing the EBISS specific announcement message will be absorbed by Pearson.

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July 17, 2003 DO #591, Modification #09

The purpose of this modification is to provide funding to support the above miscellaneous requirements under the subject National Customer Service Center (NCSC) contract. The one time charge of \$3,720 is hereby added to the previous total of \$335,130, therefore the new total of CLIN 27 is \$338,850. NCS Pearson's 07/17/03 proposal is hereby incorporated as attached.

The total price for Intelligent Call Routing (ICR) installation and ongoing line charges for Option Year 1 is \$3,720.

Option Year 2 through 4 Costs

Ongoing line charges for each subsequent option year is as follows:

- Option Year 2 = \$2,308.00
- Option Year 3 = \$2,418.00
- Option Year 4 = \$2,542.00

Executive/Price Proposal for Intelligent Call Routing

Prepared in response to:

Request from the Bureau of Citizenship and Immigration Services (BCIS)

Best "Reproducible" Copy Available

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NCS Pearson

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I.	Executive Summary	2
II.	Intelligent Call Routing Pricing Assumptions	2
III.	Intelligent Call Routing Pricing Details	4
IV.	Verification of Installation and Connectivity	45

I. Executive Summary

Pearson Government Solutions is pleased to submit our business proposal to provide the Bureau of Citizenship and Immigration Services (BCIS) with dial-up access (analog lines) to routers to be used for Intelligent Call Routing (ICR).

Pearson Government Solutions, a division of Pearson plc, a \$6 billion, publicly traded company with assessment, training, education, and publishing enterprises, has 5,600 employees nationwide in 30 locations. Pearson Government Solutions is a solidly established, responsible contractor engaged in over \$1.2 billion in business per year, much of it with US Government agencies such as the Transportation Security Administration, Federal Emergency Management Agency, Department of Education, Department of Defense and the Census Bureau. We hold numerous classified contracts with the Department of Defense and other agencies. Pearson Government Solutions has established a sterling reputation as a well-respected services provider to the US Government, capable of delivering an efficient solution for BCIS. Pearson Government Solutions has over 40 years of experience administering, scoring and reporting assessments in a wide variety of media. Pearson Government Solutions is an industry leader in data collection and reporting.

II. Intelligent Call Routing Pricing Assumptions

- 1 The analog lines will be installed at all four Tier 1 sites (Arlington, VA; Corbin, KY; Lawrence, KS; and Phoenix, AZ).
- 2. The analog lines to be installed will be POTS lines.
- 3. For each of the Tier 1 sites, an analog line will be installed at the site to provide dial-up access to the ICR router at that site.
- 4. These lines will take about 1 to 2 weeks to get installed depending on the site.
- 5. The period of performance for ICR will be the following option years:
 - Option Year 1 June 2003 through May 2004
 - Option Year 2 June 2004 through May 2005
 - Option Year 3 June 2005 through May 2006
 - Option Year 4 June 2006 through May 2007
- 6. Upon government acceptance of Contractors proposal, it will be incorporated into the subsequent modification.
- 7. All existing terms and conditions of the current contract remain unchanged with the exception of the above assumptions.

III. Intelligent Call Routing Pricing Details

Option Year 1 Cost = \$3,720.00

Charges for:

- Vendors' installation and ongoing line charges for Option Year 1.
- Installation, IT Pearson Education Data Center Services (PEDCS) escort/assistance (One resource per site)
- Setup, coordination/assistance and testing verification by one IT Project Manager & one SW Developer

Option Year 2 through 4 Costs

Ongoing line charges for each subsequent option year is as follows:

- Option Year 2 = \$2,308.00
- Option Year 3 = \$2,418.00
- Option Year 4 = \$2,542.00

IV. Verification of Installation and Connectivity

This project is complete after a test call is successfully made by dialing the phone number for each analog line as part of the final step of installation to verify that access to the router is achieved. This same activity will occur at each site.

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Dallas, TX 75216						
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April 8, 2003 DO #591, Modification #10

Service Center Referral and I-130 Status Inquiry. Effective date is April 01, 2003. NCS Pearson will provide the required services per the attached contract change proposal dated 05/15/03.

The purpose of this modification is to provide funding to support the above miscellaneous requirements under the subject National Customer Service Center (NCSC) contract. The one time charge of \$242,933 is hereby added to the previous total of \$92,197, therefore the new total of CLIN 27 is \$335,130. NCS Pearson's 05/15/03 proposal is hereby incorporated as attached.

One time charge of \$190,328 for Service Center Referral Calls and \$52,605 for I-130 Status Inquiry Calls. The total price for the above service is \$242,933 (\$190,328 + 52,605).

Executive/Price Proposal for Service Center Referrals Initiative

Prepared in response to:

Request from the Bureau of Citizenship and Immigration Services (BCIS)

Presented to:

Adam Dearing, Contracting Officer
Department of Veterari's Affairs
North Texas Healthcare System
4500 South Eancaster Roads

Nancy Radosta, INS COTR
Bureau of Citizenship and Immigration
Services, Department of Homeland Security
800 K Street NW, Room 1000
Washington, D.C. 20536-0001

Submitted by:

Pearson Government Solutions 4301 Wilson Blvd., Suite 200 Arlington, VA 22203

Contract No. GS35F4650G/BPA549022

May 21, 2003



"This proposal includes data that shall not be disclosed outside the U.S. Government and shall not be displicated used, or risclosed in which the submission of this data, the contract is awarded to this offeror as a result of or in connection with the submission of this data, the government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets identified on the page(s) marked with a restrictive legend."



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	Service Center Referrals Pricing Assumptions	
	Service Center Referrals Pricing Details	
	Service Center Referrals Deliverables	Q



I. Executive Summary

Pearson Government Solutions (NCS Pearson) is pleased to submit our business proposal to provide the Bureau of Citizenship and Immigration Services (BCIS) the Service Center Referrals Initiative.

Pearson Government Solutions, a division of Pearson plc, a \$6 billion, publicly traded company with assessment, training, education, and publishing enterprises, has 5,600 employees nationwide in 30 locations. NCS Pearson is a solidly established, responsible contractor engaged in over \$1.2 billion in business per year, much of it with US Government agencies such as the Transportation Security Administration, Federal Emergency Management Agency, Department of Education, Department of Defense and the Census Bureau. We hold numerous classified contracts with the Department of Defense and other agencies. NCS Pearson has established a sterling reputation as a well-respected services provider to the US Government, capable of delivering an efficient solution for BCIS. NCS Pearson has over 40 years of experience administering, scoring and reporting assessments in a wide variety of media. NCS Pearson is an industry leader in data collection and reporting.



(b)(4)

II. Service Center Referrals Pricing Assumptions

- 1. This proposal is for the development of the NCSC system functionality that enables Service Center Referrals.
- 2. Since this estimate is based on the Customer Requirements Document, any changes to the requirements will impact this estimate.
- All referrals will be forwarded to the four service centers (Lincoln, NE; Laguna Niguel, CA; Mesquite, TX; and Saint Albans, VT) and one Missouri Processing Center located in Lee's Summit, MO for processing.
- 4. The Service Center Referrals project will be implemented across all four Tier 1 sites (Arlington, VA; Corbin, KY; Lawrence, KS; and Phoenix, AZ).
- No additional hardware will be required. Calls will be routed down existing T-1 lines.
- Based on the duration of the calls associated with this initiative, NCS
 Pearson anticipates that the Average Handle Time (AHT) of the
 associated calls will be no longer than the AHT of the existing calls.
- 7. Existing announcements and call treatment will continue to be utilized.

8.	Development and training costs will be a one time charge.
9.	
10	
11	BCIS COTR will provide a single point of contact for all project related
	issues upon submission of the contract modification.
12	BCIS will train the trainers.
12	.DOIS will train the trainers.

This proposal includes data that shall not be disclosed outside the U.S. Government and shall not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this proposal.



- f. Pursuant to BCIS content manager, Service Center Referrals training is estimated to last two (2) hours per CSR.
- 13. The call center will operate Monday through Friday from 8am 9pm Eastern Standard Time.
- 14. There will be Call Center Supervisors available at all times that the Service Center Referrals lines are open for calls.
- 15. Call Center Supervisors are responsible for supervising, call monitoring, and scheduling activities.
- 16. NCS Pearson will monitor two calls per day per CSR.
- 17. NCS Pearson will inform BCIS of issues and/or major occurrences within 4 business hours.
- The CSRs handling Service Center Referrals callers will use English or Spanish.
- 19. Service Center Call volume is estimated to be 140,000 calls per month, of which I-130 Call volume is estimated at 100 calls per week per service center. This estimate was based upon prior weekly call volume for I-130 requests the Tier 1 Call Center received and processed for the Vermont Service Center.
- 20. The period of performance for Service Center Referrals calls will be the rest of the base period and the option years:
 - Base Period May 12, 2003 through May 31, 2003
 - Option Year 1 June 1, 2003 through May 31, 2004
 - Option Year 2 June 1, 2004 through May 31, 2005
 - Option Year 3 June 1, 2005 through May 31, 2006
 - Option Year 4

 June 1, 2006 through May 31, 2007
- 21. Service Center Status Inquiry calls will go live on Monday, May 12, 2003. CSRs will look up case status information using the CRIS web page.
- 22. NCS Pearson will be able to take Service Center Referrals calls only if the MCI changes to the IVR are completed by May 12, 2003.
- 23.A security compliant user id and password combination will be used for access to the system. Both changing of password and adding of password will be provided. All security issues will be in compliance with USDOJ Instruction 2640.2D requirements. Moreover, NCS Pearson will adhere to OIRM security instructions on all security concerns. If under the Department of Homeland Security, security requirements change, NCS Pearson will adhere to such changes and pass the price of such required changes to BCIS via contract change modification.
- 24. The CSRs will access a separate script for Service Center Referrals calls.
 - The Service Center Referrals scripts will be provided by BCIS by Monday, May 12th 2003.
 - Any delays in providing the scripts to NCS Pearson will impact the Service Center Referrals go live date and may require proposal revisions.



- 25.1-130 and the "generic" status inquiry scripts will use the first three (3) letters of the receipt number to determine the correct service center.
- 26. The Service Center Referrals including the I-130 processing information that the CSRs can refer to will be available in the BCIS Information Reference System (IRS).
 - a. Processing information is the time duration each service center requires to process a form. For example, service center 'A' has an I-130 duration of 47 months while service center 'B' has a duration of 59 months. This information is contained in the office profile (office data such as business hours, forms that are processed, directions, etc.) which is a word document.
 - b. The office profile is provided by BCIS.
- 27. The purpose of the Service Center Referrals initiative is for the call centers to provide a systematic method for CSRs to capture customer data to provide a referral letter to the customer of their request for a status inquiry.
- 28. For a duration of one week after the go live date, all transactions are to be reviewed by the Data Verification Team (DV) before they can be submitted to the BCIS Service Centers.
- 29. The Service Center trained CSRs can be logged into and expected to take other call types.
- 30. The implementation for the Service Center Referrals initiative will include transfer to Tier 2.
- 31. Development is expected to be completed by June 2003. At that point forward, all costs associated with the option years will be maintenance only.
- 32. BCIS will provide sign-off on the Service Center Referrals CRD.
- 33. Upon government acceptance Contractor proposal will be incorporated into the subsequent modification.
- 34. All existing terms and conditions of the current contract remain unchanged with the exception of the above assumptions.



III. Service Center Referrals Pricing Details

Training, Development, and Data Verification costs will be a one time charge of \$242,933.00 (\$190,328.00 + \$52,605.00). This includes the initial pilot rollout of I-130 status inquiry.

Initial I-130 Status Inquiry release:

Training, Development, and manual processing costs at a one time charge of \$52.605.00.



- Development cost to implement the initial Siebel solution to process referrals for the service centers, except California.
- Additional development cost to enable Siebel to process referrals for the California service center and to meet all new customer requirements.
- On going manual costs for processing California service center referrals.

Service Center Referrals Calls:

Training, Development, and data verification costs at a one time charge of \$190,328.00.

• Total Training Cost = \$66,735.00

- Total Development Cost = \$119,643.00
 - NCS Pearson Development Cost = \$103,200.00

Start-Up Software Development work by:

- Two (2) Software Project Managers
- One (1) Requirements Analyst
- Five (5) Test Engineers
- · One (1) Genesys Software Engineer
- One (1) Siebel Developer (Smartscript)
- One (1) Siebel Developer (Mail Merge)
- One (1) Crystal Reports Developer
- One (1) IVR Engineer
- One (1) Software Configuration Management
- One (1) Software Quality Assurance
- One (1) Information Technology Telephony Engineer
- One (1) IT Services Project Manager
- Subcontractor (FCW LLC) Expenses = \$16,443.00
 - Software development and travel expenses for one
 (1) Siebel Developer (Smartscript)
- Total Data Verification Cost = \$3,950.00

This proposal includes data that shall not be disclosed outside the U.S. Government and shall not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this proposal.



 Work done by Two (2) NCS Pearson Data Verification team resources to perform data verification for duration of one (1) week after go live date.



IV. Service Center Referrals Deliverables

Deliverable	Description
Customer Requirements Document	Document detailing customer
1	requirements is based on approved
	requirements provided by BCIS.
Training & Training curriculum	NCS Pearson Call Center Trainers
	ready to train the CSRs.
Final Delivery for Service Center	The project is complete after
Referrals Initiative	successful execution of the following
	test case:
	 Test calls will be made
	into NCS Pearson's Tier
	1 call center.
	Callers will request a
	Service Center referral.
	3. Request will be
·	processed through Siebel
	by CSR capturing
	customer data.
	Nightly process will generate a referral letter
	for the customer
	requesting a Service
	Center referral at the
	appropriate service
	center (as determined by
	the customer's receipt
	number).
	5. Referral letter will be
	emailed to a test email
	address provided by
	BCIS, to verify email
	delivery.

Contract Modification Proposal for Service Center Referrals Initiative

Prepared in response to:

Request from the Bureau of Citizenship and Immigration Services (BCIS)

Presented to:

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Department of Veteran's Affairs
North Texas Healthcare Systems
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Nancy Radosta BCIS COTR
Bureau of Citizenship and Immigration Services
Department of Homeland Security
800 K Street NW Room 1000
Washington, D.C. 20536-0001

Submitted by:

NCS Pearson: 4301 Wilson Blvd., Suite 200 Arlington, VA 22203

Contract No. GS35F4650G/BPA549022

May 21, 2003



This proposal includes data that shall not be disclosed outside the U.S. Government and shall not be duplicated, used; of disclosed—in whole or in part—for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of—or in connection with—the submission of this data, the government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets identified on the page(s) marked with a restrictive legent."



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Section 1.0 Background

The Service Center Referrals initiative is an enhancement to the NCS Pearson call center program for the Bureau of Citizenship and Immigration Services (BCIS).

The BCIS had initially requested NCS Pearson process I-130 status inquiry requests for the Vermont Service Center only. The four call sites (Arlington, VA; Corbin, KY; Lawrence, KS; and Phoenix, AZ) received and processed calls for I-130 requests. After a few months, BCIS requested NCS Pearson to develop a systematic approach to process all I-130 Status Inquiry requests for the four BCIS service centers. NCS Pearson worked with BCIS contacts to develop the requirements for capturing the required caller information and for generating the referral letters that are sent to the service centers. This initiative was the first step in utilizing the call center to process many other referral requests.

As the I-130 case status referral initiative progressed, BCIS evaluated and submitted additional requests for NCS Pearson to process other new referral categories and generate referrals on these categories to the service centers. This effort, with its increased scope, became the Service Center Referrals Initiative which will process 8 referral categories for 38 forms, including the I-130.

The Service Center Referrals system will provide the following referral categories:

- 1. Non-receipt referral
- 2. No automated info referral
- 3. Non-delivery referral
- 4. Case status referral
- 5. J-1 Waiver referral (non-612)
- 6. Change of Address referral
- 7. Typographic error correction referral
- 8. Change in pending I-129 beneficiaries/consulate/POE

Referral letters will be generated and sent to the appropriate BCIS service center via email on a nightly basis.

The Service Center Referrals scripts will be incorporated into the BCIS Information Reference System (IRS). Calls will be handled by all CSRs located at each of the four call sites (except those dedicated to EBISS during the Pilot period).



Section 2.0 Purpose

This document contains a conceptual approach to providing a technical solution to the business need currently facing the BCIS for systematically processing Service Center Referrals.

This document also contains a proposal to provide the NCS Pearson Program team with project information regarding timelines and level of effort regarding a technical solution to the business need currently facing the BCIS.

Both the conceptual approach and the proposal were formulated based on requirements provided by BCIS and on emails exchanged between BCIS and NCS Pearson to clarify the requirements.

Section 3.0 Overview

This document is divided into the following areas:

Section 4.0 Service Center Referrals Overview Description

- Service Center Referrals, which includes I-130 Status Inquiry Processing, Overview Description
- Training

(b)(4)

Assumptions

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All CSRs at each of the four call sites will be trained to answer Service Center Referrals and I-130 Status Inquiry requests. The generation of the Service Center Referrals letters is a system process that is run automatically each business night to generate and email the research page and letters.

Section 5.0 Training

Training is an important and integral part of the success of this initiative. The actual training of users will occur during the week prior to implementation of the functionality into production. All NCS Pearson CSRs at each of the four call sites will be trained by NCS Pearson Trainers. All training is available in the training room (at each site) which CSRs have access to.

Training for new hires at each of the call sites will be incorporated into the regular initial BCIS CSR training.

Section 6.0 Assumptions

Please refer to Assumptions in the Executive/Price Proposal.

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