



State of Arizona

AHCCCS – AI Call Center Integration

Task Order YH26-0031 | January 8th, 2026

Required Elements

Cover Letter

5.0 Required Elements

5.1. Cover letter with signature of authorized company representative, including contract number and contact information.

Deloitte Consulting LLP

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Tempe, AZ 85281
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January 8, 2026

Lisa Monreal, Senior Procurement Specialist
AHCCCS Procurement Office
Email: Procurement@azahcccs.gov

Submitted via Portal

RE: TASK ORDER YH26-0031, AHCCCS AI Call Center Integration

Dear Ms. Monreal,

On behalf of Deloitte Consulting LLP (“Deloitte”), we thank you for the opportunity to respond to Task Order YH26-0031.

Our team has conducted a thorough evaluation of your requirements, including the task order specifications, the comprehensive requirements matrix, and the publicly available AHCCCS modernization roadmap and vision materials. We have carefully tailored our proposal to align with your objectives and look forward to supporting turning your vision into measurable results.

Deloitte is proud to partner with AHCCCS on this innovative initiative to elevate member and provider experiences through an AI-powered, omnichannel customer service solution. Our proposal directly reflects AHCCCS’s strategic priorities by leveraging Deloitte’s proven MedConnect solution for contact centers with the ServiceNow Public Service Digital Service (PSDS) framework, building on AHCCCS’s existing investments in both Genesys and ServiceNow platforms. By automating routine inquiries such as eligibility verification, claim status checks, provider lookup, escalation processes and more, our proposed solution enables faster response times, increased operational efficiency, and improved customer satisfaction across voice, chat, email and SMS channels.

Deloitte brings deep, hands-on experience in Medicaid modernization and AI-driven government services, with successful large-scale deployments across some of the nation’s largest agencies. Our approach offers a seamless integration with Genesys telephony and routing, alongside ServiceNow’s powerful ticketing, case management, and knowledge management tools. Through intelligent automation and optimized workflows, AHCCCS customers benefit from faster and more accurate responses, while agents have more capacity to address complex inquiries. Robust security, HIPAA compliance, and strong data governance practices are embedded into every layer of the solution, protecting the sensitive information AHCCCS manages daily.

In addition to advanced technology, Deloitte provides local knowledge and a highly specialized team of experts who will support AHCCCS throughout implementation and beyond. Our experience collaborating with Arizona agencies such as the Department of Transportation and the Department of Economic Security reinforces our commitment to successful outcomes. Deloitte's partnership delivers not only an advanced, scalable system but also comprehensive training, responsive support, and flexibility to adapt as future needs evolve, enabling AHCCCS to achieve measurable improvements in efficiency and service excellence.

As a Principal, I am an authorized Deloitte Consulting LLP representative for this TASK ORDER YH26-0031 and can be reached at jnisbet@deloitte.com or +1.916.718.8331 should you have any clarifying questions.

Sincerely,



Josh Nisbet, Principal

Deloitte Consulting LLP

jnisbet@deloitte.com

+1.916.718.8331

NASPO Contract No. CTR078085, Solicitation No. BPM006672

Security and Compliance Certifications

5.0 Required Elements

5.2 FedRAMP or StateRAMP authorization, HITRUST certification, or Security and Privacy assessment and SSA-E 18 assessment or equivalent if hosted outside of AHCCCS Azure tenancy

Deloitte will host the proposed solution within AHCCCS Genesys and ServiceNow environments. No solution components are hosted outside the AHCCCS Azure Tenancy. The proposed solution includes the following FedRAMP components:

Proposed Solution Components	FedRAMP Authorized	HITRUST Certification	SSA-E 18 Assessment
ServiceNow Government Community Cloud	X	N/A	N/A
Genesys Cloud CX	X	N/A	N/A

FedRAMP is a government-wide program that promotes the adoption of secure cloud services across the federal government by providing a standardized approach to security and risk assessment for cloud technologies and federal agencies.

Genesys Cloud CX maintains a Federal Risk and Authorization Management Program (FedRAMP) Moderate Baseline Provisional Authority to Operate (P-ATO). ServiceNow's Government Community Cloud (GCC) Offering currently maintains a Federal Risk and Authorization Management Program (FedRAMP) High Baseline Provisional Authority to Operate (P-ATO). This enables ServiceNow to accelerate the adoption of our secure cloud solutions by US federal agencies & providers, and implement a standardized approach for assessing, monitoring, and authorizing cloud computing products and services under the Federal Information Security Management Act (FISMA).

GCC received its initial Provisional Authority to Operate (P-ATO) from the GCC FedRAMP in August 2019. GCC also meets Department of Defense (DoD) Impact Level 4 (IL4) and CNSSI 1253F Privacy Overlay High PII + PHI control requirements.

Please see additional information on the FedRAMP Marketplace:

- ServiceNow: <https://marketplace.fedramp.gov/#/product/service-now-service-automation-government-cloud-suite?sort=productName&serviceModels=SaaS>
- Genesys: <https://marketplace.fedramp.gov/products/FR2131766015>

Evidence of GovRAMP authorization can be found here: <https://govramp.org/product-list/>

Federal Compliance for Federal Hub Data

5.0 Required Elements

5.3 Proof compliance with federal regulations for solutions that will process, store, or transmit data from the Federal Hub.

Deloitte will use the Genesys and ServiceNow platforms operated by AHCCCS which adheres to relevant, measurable, and industry-recognized information security frameworks. These include ISO 27001, 27017, and 27018, as well as accreditation with regional standards and regulations. Additionally, ServiceNow's Government Community Cloud (GCC) offering currently maintains a Federal Risk and Authorization Management Program (FedRAMP) High Baseline Provisional Authority to Operate (P-ATO). Transparent disclosure is an additional element of assurance available to all customers. This includes, but is not limited to, the provision of the SOC audit reports and various security certificates.

For a full list of certifications and attestations, please see:

<https://www.servicenow.com/company/trust/compliance.html#certifications>

As the ServiceNow integrator, Deloitte also adheres to the federal data protection requirements and encryption methods applicable to Deloitte in its delivery of the Services.

HIPAA, Arizona Security, and ACA Requirements

5.0 Required Elements

5.4. HIPAA Privacy and Security – specifically CFR title 45 public Welfare, Parts 155.260 and 164 – Security and privacy; Arizona Security standards and policies set by ADOA / ASET; and all applicable ACA requirements and standards, including MARS-E.

ServiceNow’s Government Community Cloud (GCC) offering currently maintains a Federal Risk and Authorization Management Program (FedRAMP) High Baseline Provisional Authority to Operate (P-ATO). This enables ServiceNow to accelerate the adoption of secure cloud solutions by US federal agencies & providers, and implement a standardized approach for assessing, monitoring, and authorizing cloud computing products and services under the Federal Information Security Management Act (FISMA).

In addition to FedRAMP certification, Deloitte will adhere to HIPAA Privacy and Security requirements applicable to it in its delivery of the Services – specifically CFR Title 45, Parts 155.260 and 164 – Arizona state security standards set by ADOA/ASET, and all ACA requirements, including MARS-E including MARS-E (Minimum Acceptable Risk Standards for Exchanges) and ARC-AMPE(Acceptable Risk Controls for ACA, Medicaid, and Provider Entities). Our approach includes robust administrative, physical, and technical safeguards to protect sensitive data, alignment with Arizona and federal policies, and ongoing risk assessment and training. We maintain continued compliance with all applicable standards through regular audits, prompt incident response, and comprehensive documentation.



PART A

A1 Transmittal Letter



A1 Transmittal Letter

5.5 Transmittal Letter

5.0 Required Elements

The Transmittal Letter should briefly summarize the Offeror's ability to supply the requested services that meet the requirements defined in the Task Order and must contain a statement/attestation indicating the Offeror's willingness to provide the services and deliverables, subject to the terms and conditions set forth in the Task Order.

A person authorized to commit the Offeror to its representations and who can certify that the information offered in the proposal meets all general conditions must sign the Transmittal Letter. In the Transmittal Letter, please indicate the principal contact for the proposal along with an address, telephone number, and an email address if that contact is different than the individual authorized for signature.

In addition to the required detailed legal analysis, the Offeror shall summarize in their Submittal Letter the list of distinct portions, including exact page numbers, of their document is requested to be kept confidential. See "Request for Proprietary / Confidential Determination" paragraph (below).

December 9, 2025

Lisa Monreal, Senior Procurement Specialist
AHCCCS Procurement Office
Email: Procurement@azahcccs.gov

Submitted via Portal

SUBJECT: Transmittal Letter for TASK ORDER YH26-0031, AHCCCS AI Call Center Integration

Dear Ms. Monreal,

On behalf of Deloitte Consulting LLP ("Deloitte"), I am pleased to submit our proposal in response to Task Order YH26-0031, as issued by the Arizona Health Care Cost Containment System ("AHCCCS"). After a thorough review of the task order requirements, we are confident in our ability to deliver a robust, AI-powered, and omnichannel customer service solution building on the state's existing investments in the Genesys and ServiceNow platforms.

Deloitte brings a strong record of accomplishment in Medicaid modernization and government transformation. We have partnered with public sector agencies nationally and with Arizona state agencies locally to deliver advanced, customer-centric, and compliant solutions that drive improvements in operational efficiency and member experience. We look forward to the opportunity to work alongside AHCCCS, supporting your continued innovation in service delivery.

Your vision, our mission

Imagine an Arizona Health Care Cost Containment System (AHCCCS) where Medicaid eligibility is **seamless, swift, and empowering** for every member, every worker, and every partner across multiple engagement channels. That vision starts here. Deloitte's commitment to modernizing eligibility and member experiences extends beyond core systems to embrace the crucial touchpoints that define service quality and nowhere is this clearer than in our contact center transformation and AI capabilities. As AHCCCS advances toward a truly human-centered ecosystem, our expertise with Genesys, ServiceNow, and other leading contact center platforms positions us to empower Arizona's teams and members with responsive, AI-infused solutions across every channel. Our solution harnesses the agility of AI features in both Genesys and ServiceNow, enhanced by Deloitte's Contact-Center-as-a-Service (CCaaS) AI configurations and delivered by a powerhouse team rooted in Arizona. We're **making the member and staff experience frictionless**, leveraging AI for both self-service and agent-assist

capabilities to completing tasks easier and more efficient. This is the modernization Arizona deserves; practical, innovative, and ready to deliver results **where it matters most**.

Our Promise to Arizona: Outcomes that Matter

AHCCCS is embarking on a bold modernization to deliver faster, more accurate determinations, simpler renewals, and an intuitive, omnichannel member experience by implementing an AI-Powered contact center with an integrated Genesys and ServiceNow solution. Our approach allows these outcomes to be tangible and visible to leadership, frontline teams, and the communities they serve.

By maximizing the Genesys and ServiceNow AI capabilities, AHCCCS gains an innovative, configurable, scalable, secure, and accessible platform that meets people where they are – online, by phone, chat, SMS, email, or in person, while dramatically reducing administrative burden for staff and elevating every point of contact. Through robust Genesys integration, we enable next-generation engagement: AI virtual agents, intelligent routing, automated knowledge delivery, and predictive analytics to support callers, members, and agents alike with real-time, accurate information and empathetic service.

We don't just transform technology, our relentless collaboration focuses on program outcomes that drive real, measurable uplift. We deliver:

- Tangible gains in service delivery and member satisfaction, powered by AI-driven insights and self-service.
- End-to-end operational efficiency, with seamless handoffs between digital and voice channels through integrated Genesys and ServiceNow workflows.
- Technology modernization outcomes that mirror AHCCCS's vision for resilient, future-ready operations.

Our team's deep experience with eligibility rules engines, CMS alignment, complex systems integrations, policy translation, stakeholder engagement, and real-time analytics positions AHCCCS to lead the nation in AI-powered, user-centered eligibility and service delivery. With Deloitte's track record in implementing Genesys and ServiceNow, and our unique ability to weave AI and automation throughout every interaction, AHCCCS will be empowered with a solution that evolves with changing needs, anticipates member preferences, and delivers on the promise of a modern Medicaid experience.

Unmatched Experience

Modernizing Medicaid eligibility and member services is a complex, high-impact transformation that demands more than technical proficiency, it requires trusted leadership, proven at scale across the nation's largest and most dynamic environments. Deloitte stands at the forefront of this work, having delivered more integrated eligibility and AI-powered contact center solutions than any other vendor, and currently supporting 8 of the 10 largest Medicaid systems in America. Our track record includes deploying advanced, omnichannel service models that balance operational excellence with member-centric innovation.

Our approach is grounded in hands-on Medicaid domain expertise, mastery of the ServiceNow platform, and deep proficiency in delivering Genesys-enabled AI contact centers. Deloitte doesn't simply implement technology, we drive holistic transformation across people, processes, and platforms. We view each project as an opportunity to reimagine member interactions, streamline benefits management, and deliver measurable, high-value outcomes; in alignment with Arizona's integrated vision.

What this means for AHCCCS:

- **Confidence in Delivery:** Our team’s portfolio includes the largest Medicaid systems in the country – California, Texas, New York, Florida, and Pennsylvania – as well as states with some of the highest ex-parte renewal rates, such as Washington, Oregon, Kentucky, Nevada, Connecticut, and New Hampshire. Additionally, we have implemented contact center solutions across 27 states and 10 federal agencies within the public sector. This breadth of experience provides that AHCCCS benefits from best-in-class, innovative solutions that set the industry standard.
- **Contact Center Experience:** Deloitte is recognized as an industry leader in delivering multi-channel contact center engagement solutions, helping organizations streamline constituent interactions across various platforms. We have proudly served 27 states and 10 federal agencies within the public sector in transforming their constituent engagement strategies.
- **Tap into the Nerve Center:** With a robust team of over 21,000 public sector professionals, including 4,000 dedicated to Health and Human Services, and 2,600 focused on eligibility and enrollment, we have the capacity to rapidly adapt to policy changes and certification activities. Our analytics experts drive sharper reporting and targeted decision support, fueling better management and measurable impact.
- **Repeatable Patterns:** Our proven methodologies and repeatable patterns improve timeliness and reduce rework. We have successfully transitioned operations during critical periods (e.g., California’s CalHEERS transition during COVID-19, completed three months early), delivered award-winning innovations (such as Kentucky’s Integrated Eligibility and Enrollment System, commended for excellence during the Public Health Emergency), and leveraged automation and AI to reduce manual tasks and streamline operations in states like Tennessee and Michigan.
- **Advanced intelligence:** Deloitte’s leadership in the responsible use of emerging Artificial Intelligence technologies for delivery and operations gives AHCCCS more consistency in documentation, more rigor in validation, and more speed in responsiveness while protecting the valuable data entrusted to you.

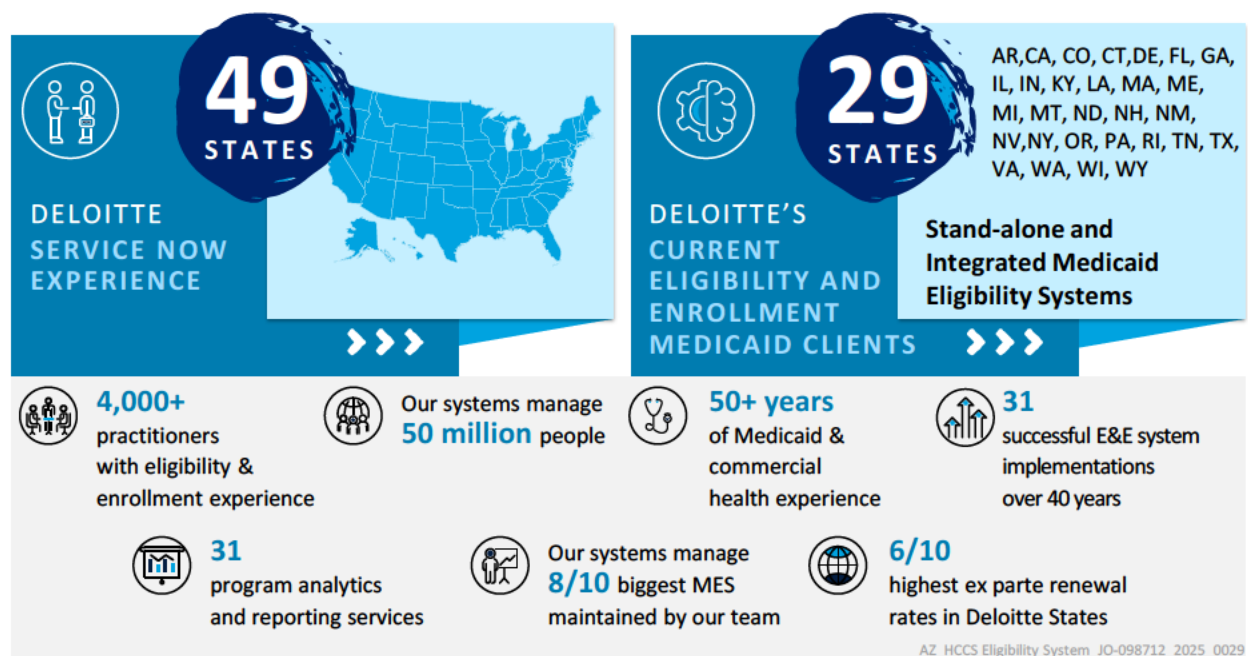


Figure 1: Vendor of Choice for Medicaid and Service Now

The A-Team, for the Long Haul

Our proposed team for AHCCCS is built for this moment and ready to partner with you for the long run. We have carefully selected a **team optimized to deliver** an integrated ServiceNow + Genesys solution by incorporating by pairing **national Medicaid program leaders** and eligibility SMEs with **ServiceNow Certified Architects, Genesys Engineers**, and AI developers. Each member brings direct experience in large-scale modernization, human services transformation, or Public Sector Digital Services, driving project success and risk mitigation for AHCCCS. **Arizona-based resources** provide rapid engagement and a deep understanding of local needs, while our broader national team members provide deep expertise across CCaaS, CRM, and AI solutions.

Innovation with Confidence: Genesys + ServiceNow

Our proposed solution integrates Genesys and ServiceNow to provide a unified experience for agents and incorporate the AI capabilities to enhance self-service for customers. The Genesys and ServiceNow integration creates an intelligent, omnichannel customer engagement platform that serves as a single source of truth for all member interactions and service requests. This unified architecture eliminates operational silos, reduces manual handoffs, and enables AI-powered automation at every stage of the member journey, from initial inquiry through resolution and follow-up.

Intelligent Virtual Agent Capabilities

The Genesys Cloud Virtual Agent delivers conversational interactions that go far beyond traditional chatbots:

- **Advanced Natural Language Understanding (NLU):** Interprets real member intent and adapts to new topics over time, using business process knowledge to rapidly onboard new use cases.
- **Conversational Intelligence:** Provides fluid, multi-turn dialogue, automatically summarizes interactions for continuity, and delivers human-like responses using AI, not just static scripts.
- **No-Code Configuration:** An intuitive designer allows rapid updates and new workflows without custom code, supporting fast iteration based on member and staff feedback.

Healthcare-Specific Use Cases

Our AI virtual agent expertly handles core functions such as:

- **Eligibility Verification:** Fast, accurate checks on member coverage, benefits, and co-pays, deflecting routine calls and escalating only what's necessary to live agents.

- **Claim Status Updates:** Real-time insights on claim status and resolutions, with proactive guidance for common issues and seamless escalation for complex cases.
- **Provider Lookup:** Smart, guided search for in-network care, including appointments and provider ratings.
- **Seamless Escalations:** Intelligent triage and smooth handoff to human agents, sharing full transcripts and context to avoid repeat explanations and improve resolution times.

Real-Time Agent Assistance

Genesys Agent Copilot empowers live agents by surfacing relevant knowledge, suggesting tailored responses, and monitoring sentiment in real time. Agents receive real-time coaching on empathy and soft skills, while after-call summaries and automated wrap-ups streamline case management, enhancing both service quality and operational efficiency.

Knowledge Management with ServiceNow

Integrating **ServiceNow Now Assist**, our solution revolutionizes knowledge management:

- **Automated Article Creation:** AI generates and curates knowledge articles from past cases, ensuring content is current and relevant.
- **Smart Search:** Members and staff receive instant, summarized answers using semantic search, improving accessibility and reducing effort.
- **Workflow Intelligence:** The system routes articles for review, keeps content up to date, and maintains robust audit trails for compliance.

Transformative Self-Service Benefits

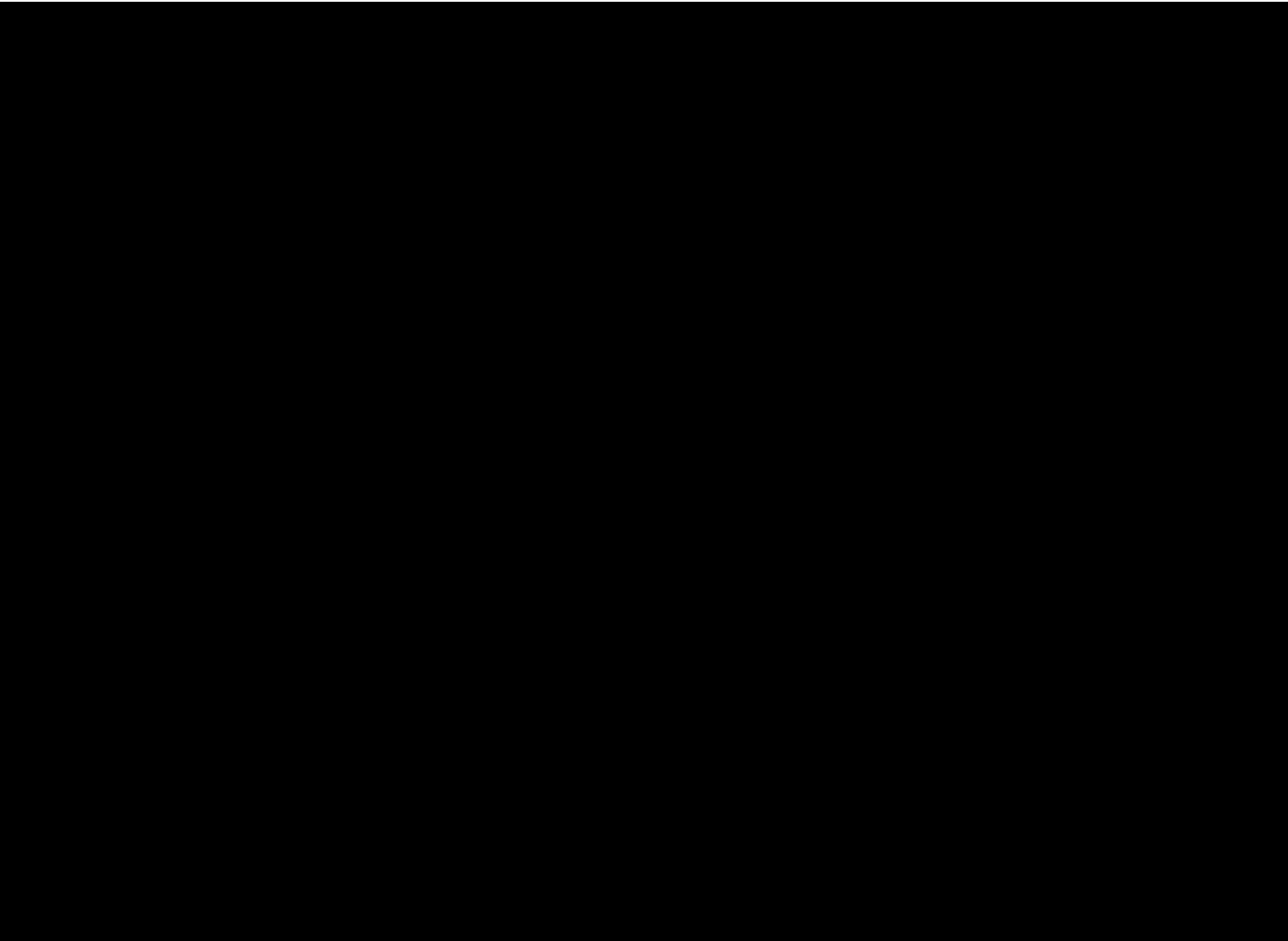
- **24/7 member support** with immediate, accurate answers on benefits, eligibility, and claims
- **Shorter wait times** and reduced agent workloads by resolving routine issues without human intervention
- **Informed decision-making** backed by high-quality, accessible knowledge content
- **Continuous improvement** as analytics drive knowledge updates and enhance member experience

The AI-powered Genesys and ServiceNow solution delivers measurable improvements in efficiency, accuracy, and member satisfaction, modernizing AHCCCS contact centers to meet Arizona's needs today and position for innovation tomorrow.

Security, Privacy, and Compliance – Embedded from Day One

Protecting PHI/PII and maintaining compliance are central to AHCCCS's mission. Our approach embeds **privacy-by-design and security-by-default** from requirements through operations: role-based access control (RBAC), AI guardrails, strong encryption, secure development practices, continuous vulnerability scanning, hardened infrastructure, and active monitoring and incident response. Compliance frameworks are integrated throughout the lifecycle, CMS ARC-AMPE/MARS-E, NIST 800-53 Rev 5, and HIPAA. Audit-ready documentation and traceability built into normal work supports both operational resilience and audit readiness, **reducing the administrative burden** of assembling evidence at certification time.

Meanwhile the FedRAMP-authorized cloud infrastructure (including Genesys and ServiceNow) provide Arizona with a **secure, scalable hosting environment**. This includes inherited least-privilege access aligned to business roles and functions. Continuous monitoring, rapid incident response, and transparent remediation maintain a compliant posture today and as CMS security expectations evolve.



- **Faster, more predictable delivery and timeliness gains** through sprint-based releases, transparent tracking, and early course correction.
- **Higher quality and audit readiness by design** via RTM-driven acceptance criteria, embedded testing, and CAP-driven closure, supporting compliance expectations as part of daily work.
- **Inclusive access statewide** by building accessibility (ADA/Section 508/WCAG) into design reviews and test cycles so usability and compliance are validated continuously, not bolted on late.
- **Sustained adoption and operational lift** through human-centered OCM, role-based training, communications, and feedback loops synchronized to releases so Arizona realizes value in practice, not only at go-live.

Truly Modern Experience – not just faster, but *more human*

As Arizona looks to the future, the vision for AHCCCS is clear: families gain straightforward, responsive support; staff are empowered to focus on meaningful, high-value work; and seamless, trustworthy collaboration at every step. That's the driving force behind this AI-powered contact center transformation, built on Genesys and ServiceNow to deliver results you can see, faster response times, data-driven accuracy, and positive, confidence-inspiring experiences for all Arizonans.

Arizona shouldn't have to choose between innovative technology and dependability. Deloitte uniquely blends deep Medicaid expertise, proven ServiceNow integration, and complex, statewide deployment experience with a leadership track record in contact center modernization. No one offers a more robust portfolio of AI-enabled Genesys and ServiceNow solutions for public-sector programs including successful, large-scale eligibility integrations and recognized excellence in ServiceNow-powered transformation.

By leveraging GenAI and workflow automation, we bring together national best practices and practical, real-world experience to create a resilient, modular contact center that meets Arizona's distinct needs, delivering the Arizona value roadmap with confidence.

Thank you for the opportunity to partner with AHCCCS on this nation-leading initiative. We are truly excited and deeply appreciative to work together on a contact center modernization that is modular, secure, transparent, and ready to elevate the lives of Arizonans. With the best of today's AI, Genesys platform innovation, and ServiceNow's flexibility, we are committed to building a future-proof solution that grows as Arizona's needs evolve.

Our team has conducted a thorough evaluation of your requirements, including the task order specifications, amendments, the comprehensive requirements matrix, and the publicly available AHCCCS modernization roadmap and vision materials. We have carefully tailored our proposal to align with your objectives and look forward to supporting you turning your vision into measurable results.

On behalf of Deloitte Consulting LLP, I confirm our willingness to provide the services and deliverables as outlined in our proposal and subject to the finalized terms and conditions, and that the information offered in our proposal meets the conditions outlined in the Task Order. Should you have any questions, please reach out to me as the principal contact for this proposal.



Josh Nisbet, Principal
Deloitte Consulting LLP
100 South Mill Avenue, Tempe, AZ 85281
jnisbet@DELOITTE.com
+1 916 718 8331

Proprietary/Confidential Information

In addition to the required detailed legal analysis that we've included as **Part C1** of our submission, the table below summarizes the distinct portions, including exact page numbers, of our proposal that we request to be kept confidential. Each of the pages indicated have had redactions applied to the specific confidential portions, and those pages have been marked confidential. We've also included a separate file in our submission with 'REDACTED' included in the file name.

Section Number, Page Number(s)	Description of Confidential/Trade Secret Material
5.5 Transmittal Letter; Page 10	Identities and Qualifications of Personnel and Subcontractors
5.5 Transmittal Letter; Page 12	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.5 Transmittal Letter; Page 13	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.5 Transmittal Letter; Page 14	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.6 Experience, Expertise and Capacity of the Firm; pages 21	Past and Present Clients/Customers, Reference Information, and Experience
5.6 Experience, Expertise and Capacity of the Firm; page 22	Past and Present Clients/Customers, Reference Information, and Experience
5.6 Experience, Expertise and Capacity of the Firm; page 23	Past and Present Clients/Customers, Reference Information, and Experience
5.6 Names and Classification of Key Staff; page 24	Identities and Qualifications of Personnel
5.6.2 Resumes of Project Delivery Team (Key Staff); page 25	Identities and Qualifications of Personnel
5.6.2 Resumes of Project Delivery Team (Key Staff); page 26	Identities and Qualifications of Personnel
5.6.2 Resumes of Project Delivery Team (Key Staff); page 27	Identities and Qualifications of Personnel
5.6.2 Resumes of Project Delivery Team (Key Staff); page 28	Identities and Qualifications of Personnel
5.6.2 Resumes of Project Delivery Team (Key Staff); page 29	Identities and Qualifications of Personnel
5.6.2 Resumes of Project Delivery Team (Key Staff); page 30	Identities and Qualifications of Personnel
5.7.1 Method of Approach; page 32	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.7.1 Method of Approach; page 33	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.7.1 Method of Approach; page 34	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.7.1 Method of Approach; page 35	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.7.1 Method of Approach; page 36	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.7.2. How Vendor will Satisfy Requirements; page 38	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach

5.7.3. Proposed Timeline; page 41	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.8. Solution Overview; page 43	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.8. Solution Overview; page 46	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.8. Solution Overview; page 47	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach
5.8. Solution Overview; page 50	Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach



PART A

A2 Signed Solicitation Amendment





TASK ORDER SOLICITATION AMENDMENT #1		
Task Order: YH26-0031 AHCCCS AI Call Center Integration	Solicitation Due Date: December 9, 2025, 3:00 pm Phoenix, AZ Time	Procurement Officer: Lisa Monreal Email: procurement@azahcccs.gov

A signed copy of this amendment must be submitted with your solicitation response.
 This Solicitation is amended as follows:

This solicitation amendment is being issued to correct and confirm the conflicting due dates listed in the task order.

Paragraph # or Title	Page #	Amendment
Task Order	1	The Questions due date listed on the front page of the Task Order is hereby corrected to November 21, 2025.
Task Order	1	The Answers Posted due date listed on the front page of the Task Order is hereby deleted.
Attachment 5 Task Order Instructions to Offerors	1	The Questions due date is hereby corrected to November 21, 2025.
Attachment 5 Task Order Instructions to Offerors	1	The Answers Posted due date for this Task Order is hereby deleted.

No other changes are being made at this time.

OFFEROR HEREBY ACKNOWLEDGES RECEIPT AND UNDERSTANDING OF THE SOLICITATION AMENDMENT	THIS SOLICITATION AMENDMENT IS HEREBY EXECUTED ON THE DAY, IN PHOENIX, AZ
SIGNATURE OF AUTHORIZED INDIVIDUAL: 	SIGNATURE: SIGNATURE ON FILE
TYPED NAME: Josh Nisbet	TYPED NAME: Meggan LaPorte, CPPO, MSW
TITLE: Principal	TITLE: Chief Procurement Officer
DATE: 1/8/2026	DATE: November 20, 2025



TASK ORDER SOLICITATION AMENDMENT #2		
Task Order: YH26-0031 AHCCCS AI Call Center Integration	Solicitation Due Date: Thursday, January 8, 2026, 3:00 pm Arizona Time	Procurement Officer: Lisa Monreal Email: procurement@azahcccs.gov

A signed copy of this amendment must be submitted with your solicitation response.

This Solicitation is amended as follows:

Paragraph # or Title	Page #	Amendment
Task Order	1	The Proposal Due Date is revised from December 9, 2025, at 3:00 PM (Arizona Time) to January 8, 2026, at 3:00 PM (Arizona Time).
Attachment 1 AI Call Center Requirements Response Matrix	Global Requirements Tab	Global Requirements 97 (GR97) has been incorporated into the Requirements Response Matrix document.

The attached documents are hereby incorporated into this solicitation amendment.

1. AHCCCS Responses to the Questions and Answer Form; and
2. Revised Attachment 1 of the Requirements Response Matrix.

No other changes are being made at this time.

OFFEROR HEREBY ACKNOWLEDGES RECEIPT AND UNDERSTANDING OF THE SOLICITATION AMENDMENT	THIS SOLICITATION AMENDMENT IS HEREBY EXECUTED ON THE DAY, IN PHOENIX, AZ
SIGNATURE OF AUTHORIZED INDIVIDUAL: 	SIGNATURE: SIGNATURE ON FILE
TYPED NAME: Josh Nisbet	TYPED NAME: Meggan LaPorte, CPPO, MSW
TITLE: Principal	TITLE: Chief Procurement Officer
DATE: 1/8/2026	DATE: December 8, 2025



PART B

B1 Experience, Expertise and Capacity



5.6 Experience, Expertise and Capacity of the Firm

5.6. Experience, Expertise and Capacity of the Firm

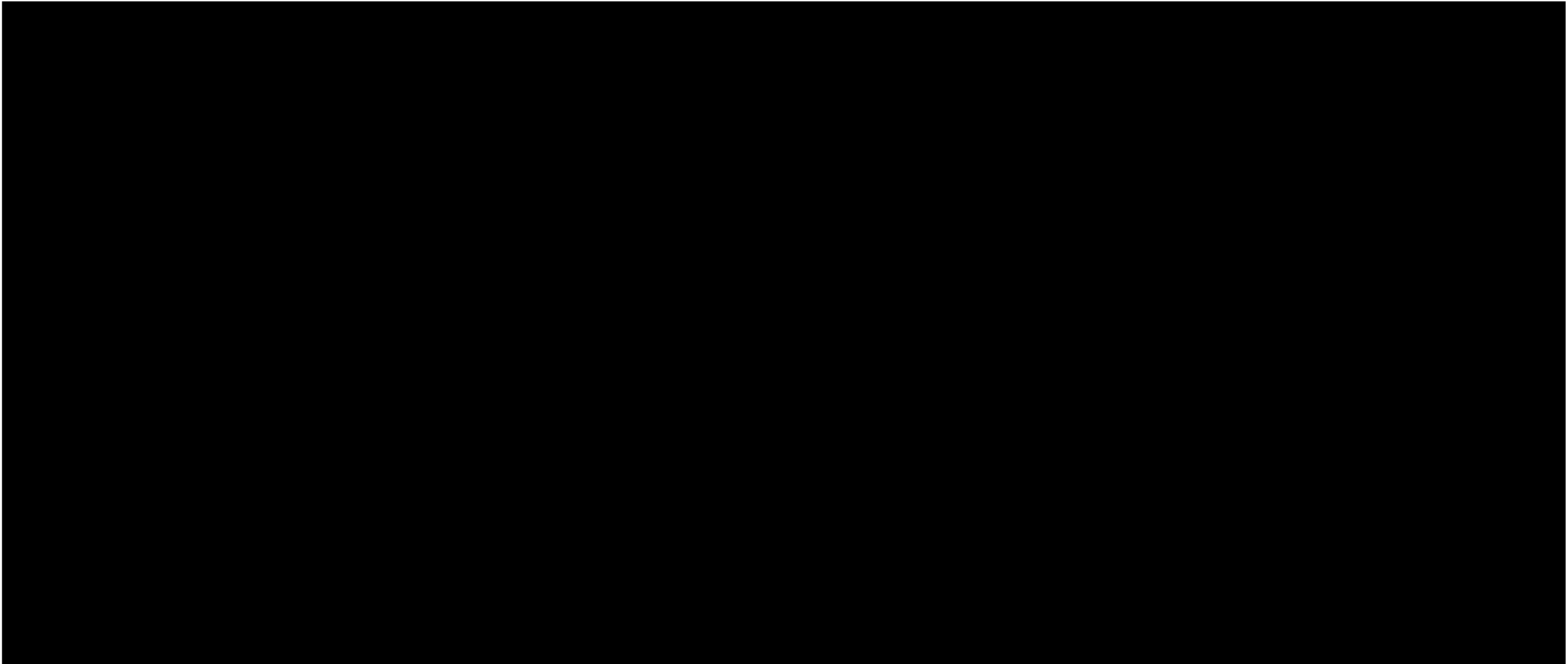
5.6.1. Specific experience, expertise, and capacity of the firm with this type of initiative. (Limit 10 pages)

Arizona’s Medicaid leaders operate at the intersection of rising member expectations, complex eligibility landscapes, rapid technology change, and increasing regulatory requirements. Delivering timely, accurate, and compassionate service – often across multiple channels – demands not only operational agility, but also seamless integration of technology, policy, and organizational know-how. We understand that AHCCCS’s mission is about more than efficient transactions; it is about improving outcomes for Arizona families while balancing compliance, budget stewardship, and sustainable innovation.

Deloitte recognizes these challenges because we have worked alongside public sector health agencies navigating similar journeys. Our experience supporting Arizona and other states has shown that success comes from truly understanding agency priorities, stakeholder needs, and the realities on the ground. We believe the path forward requires more than deploying the latest technology: it calls for a thoughtful approach that unites people, processes, and platforms to create measurable, meaningful improvements, both for your members and the operational teams who serve them every day.

This is where our expertise comes in. Our team combines local insight with national Medicaid transformation experience, deep ServiceNow and customer service integration skills, and a partnership-oriented mindset. Whether the issue is streamlining eligibility determinations, making provider information more accessible, or navigating new compliance requirements, our commitment is to work as one team with AHCCCS so challenges become shared victories, and solutions are built with your unique environment in mind.

By focusing on your most pressing operational and member experience issues, then applying proven methods and hands-on understanding, Deloitte partners with AHCCCS to turn vision and objectives into sustainable results.



Genesys Expertise as an Integrated Strength



Figure 7. Deloitte Partnership with Genesys

Building on our ServiceNow leadership, Deloitte also offers deep experience in deploying and enhancing Genesys platforms for contact center transformation and Artificial Intelligence (AI) integration. Recognized as Genesys’ Global Systems Integration Partner of the Year, Deloitte delivers seamless, end-to-end Customer Experience (CX) solutions that complement and extend ServiceNow investments. Our integrated methodologies mean clients benefit from advanced AI capabilities across both workflow automation (through ServiceNow) and customer engagement (through Genesys), all supported by Deloitte’s decade-spanning global practice. We leverage proprietary accelerators, proven frameworks, and industry best practices to maximize the combined value of these platforms. Deloitte’s integrated teams, spanning ServiceNow, Genesys, and public sector expertise is comprised of 6000+ consultants, engineers, technologists, and agents serving contact center projects. This uniquely equips us to support agencies like the Arizona

Health Care Cost Containment System (AHCCCS) in achieving innovative, sustainable, and high-impact digital transformation objectives.

Deloitte combines the unmatched distinction of being a ServiceNow Global Elite Partner with pioneering experience in Genesys CX transformation and AI. For AHCCCS, this means a partner able to deliver robust, forward-looking solutions, powered by technical leadership, multidisciplinary talent, and a commitment to client outcomes.

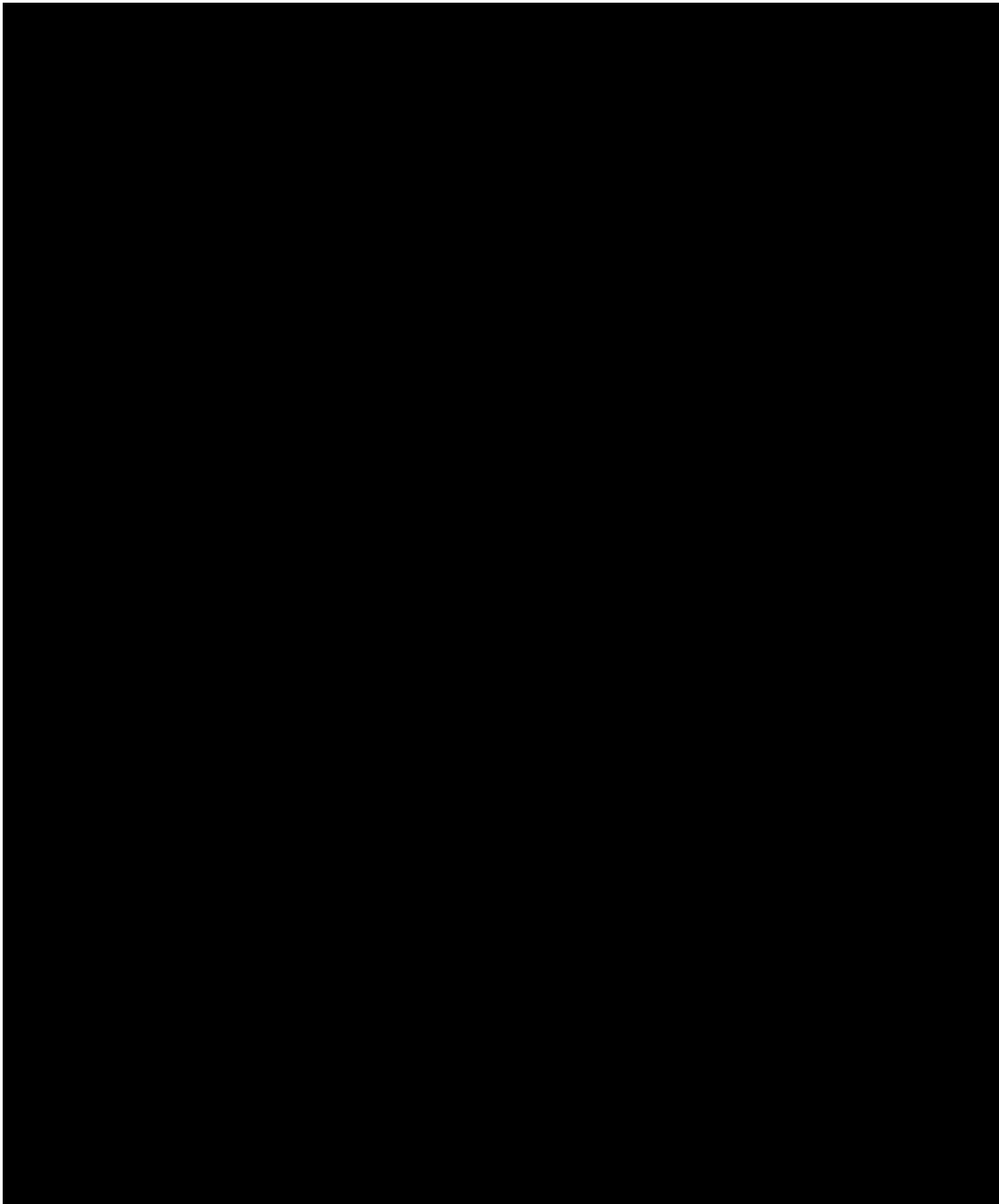
ServiceNow AI Implementation Leadership

Deloitte is uniquely positioned as one of only six ServiceNow Global Elite Partners, representing ServiceNow’s highest level of partnership and distinction worldwide. This elite status directly benefits clients like AHCCCS by providing dedicated technical support resources, which Deloitte integrates into a robust governance model underpinning our proven implementation methodology. Additionally, Deloitte’s Global Elite Partner status grants us first access to ServiceNow’s new releases and innovations, allowing us to introduce emerging capabilities to your program well before they become widely available. This proactive approach can provide AHCCCS with a future state vision that is continually informed by the latest ServiceNow advancements.

Our track record is built on a combination of tested methodologies and deep ServiceNow insights, delivering successful outcomes for clients around the globe, including numerous state Medicaid agencies, including Florida, Tennessee and California. Deloitte’s commitment to client service and operational excellence is reflected in holding one of the **highest Customer Satisfaction scores among the ServiceNow Global Elite Partners**, as measured by ServiceNow. When partnering with Deloitte, AHCCCS gains a partner with a ServiceNow practice unmatched in both technical capability and delivery capacity.



Figure 8: Deloitte's experience and partnership with ServiceNow



5.6.2 List of Names and Classification of Personnel

5.6 Experience, Expertise and Capacity of the Firm

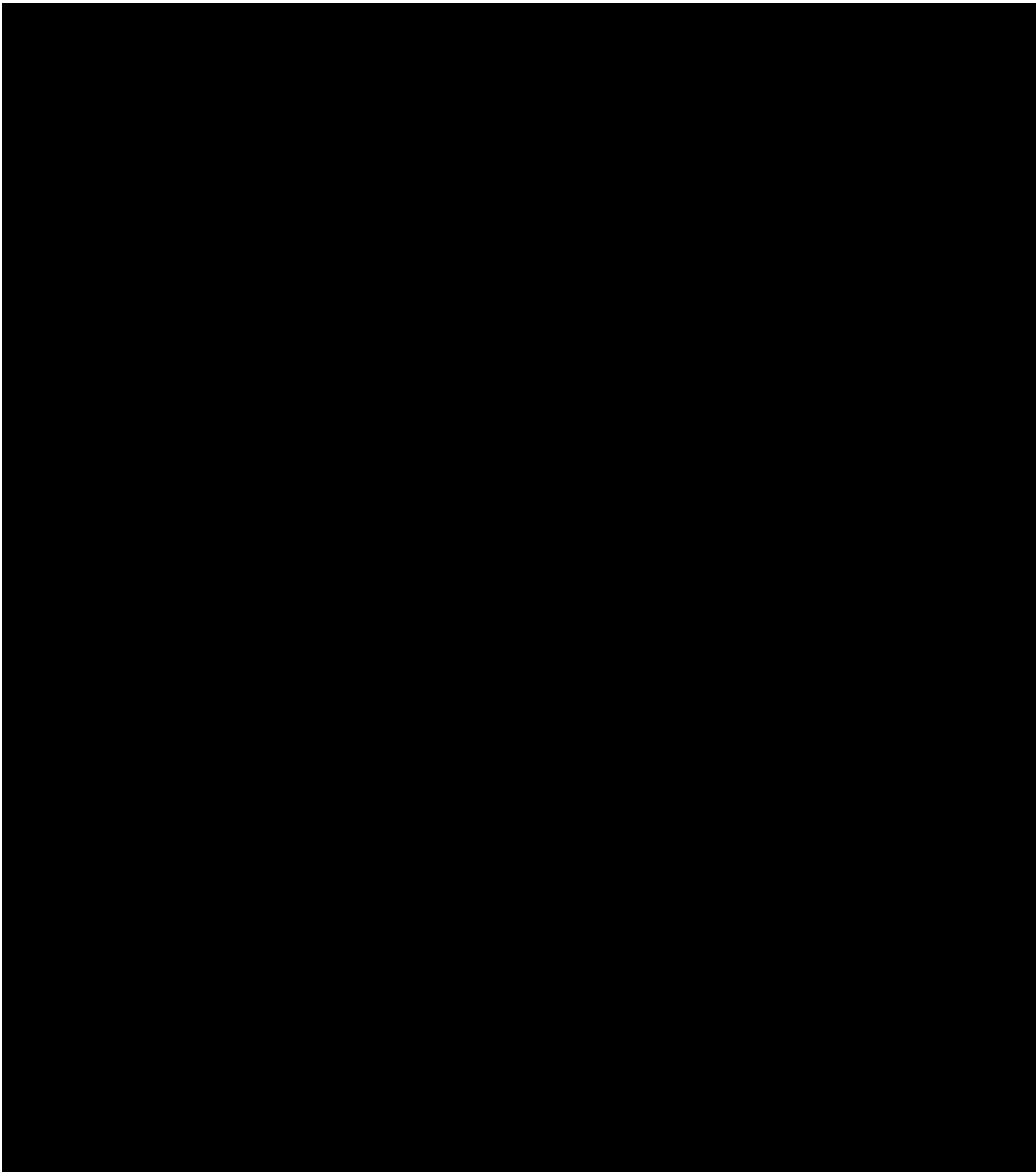
5.6.2. List of names and classification of personnel expected to perform specific activities, including the use of subcontractors.

5.6.3 & 5.6.4 Experience and Expertise of the Proposed Staff

5.6 Experience, Expertise and Capacity of the Firm

5.6.3. Experience and expertise of the proposed staff with this type of initiative.

5.6.4. A description of Experience, Expertise and Capacity of the proposed staff.



expertise spans large-scale system development, IT and data strategy, and user-focused platform innovation in federal, defense, and commercial environments.



Key Technical Skills and Experience

ServiceNow Architecture and Solution Engineering:

- Subject Matter Expert and technical advisor for critical ServiceNow initiatives across Senate, DHS, CMS, NIH, US Coast Guard, Army, Raytheon, and state/local agencies.
- Architected and deployed enterprise-grade ServiceNow ITSM, ITBM, CSM, and HRSD solutions, supporting multi-tenant, high-security, and mission-critical government operations.
- Led rapid “surge” development and strategic technology advisement for federal clients, enabling secure, policy-aligned ServiceNow implementations under aggressive deadlines.
- Provided mentorship in ServiceNow custom scripting, integrations (REST/SOAP APIs, MID Server, SSO), and platform best practices for diverse technical teams.
- Orchestrated multi-instance migrations, platform consolidations, and large-scale user portal rollouts, achieving measurable gains in usability and operational efficiency.

Digital Product Design, UX/UI, and User Experience:

- Drove enterprise-wide Service Portal/CSM custom UI design and widget development using AngularJS, JavaScript, HTML, and CSS to modernize user interfaces for 150,000+ end-users.
- Advanced Section 508-compliant UX for citizen portals, command dashboards, and agency knowledge platforms.
- Prototyped and delivered interactive widgets, virtual agents, and dynamic site experiences to streamline case management and user support at scale.

Cloud Services, Integrations, Data, and Security:

- Integrated ServiceNow with AWS, SharePoint, SAP, IBM, and other enterprise platforms for advanced document, workflow, and reporting needs.
- Engineered robust access control, encryption, and compliance methods to support large-scale federal vetting and casework (e.g., CMS, CG-86).
- Developed real-time platform dashboards and data visualizations for executive reporting, delivering insights for decision makers at the White House, DHS, and beyond.

Programming and Tools:

- Platforms: ServiceNow (ITSM, ITBM, CSM, SAM, SIR, AppEngine, HRSD, Service Portal), AWS, JIRA, SharePoint, Unity, Unreal, Adobe XD, Tableau, Android Studio, Microsoft Azure (training)

Certifications and Credentials

- ServiceNow: System Administrator (CSA) & Certified Application Developer (CAD)
- ServiceNow Certified Implementation Specialist – ITSM (CIS-ITSM) & CSM (CIS-CSM)
- ECAOE Enterprise Architect, Tableau Desktop Specialist, CompTIA Security+ CE

Summary: Katelyn is an inventive, results-driven ServiceNow architect and technical manager recognized for driving measurable transformation and operational agility in diverse government and commercial settings. She specializes in enterprise platform integration, user-centric product design, and strategic digital modernization, delivering genuine business value and exceptional user experience for mission-critical clients.



PART B

B2 Method of Approach

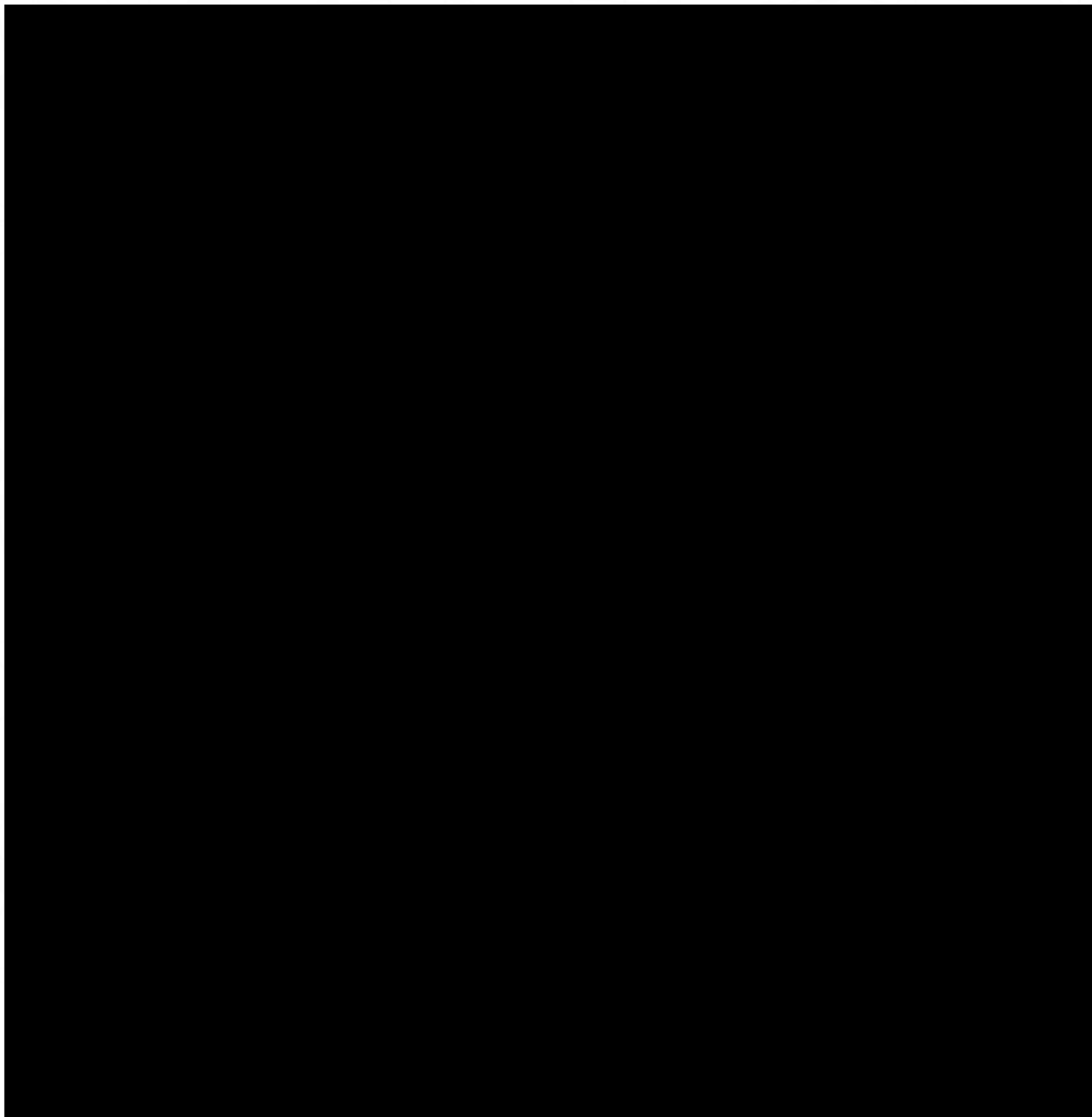


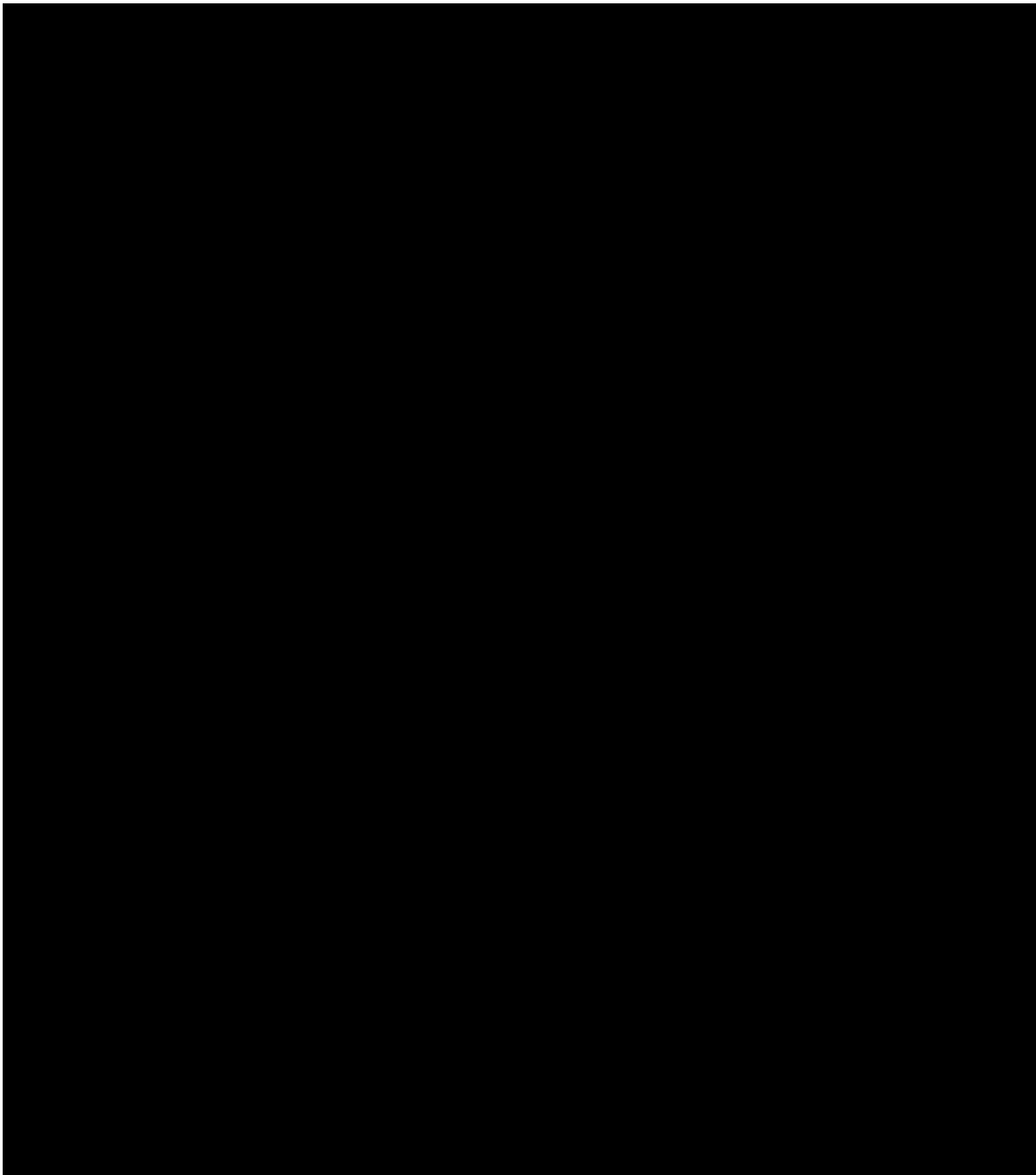
Method of Approach

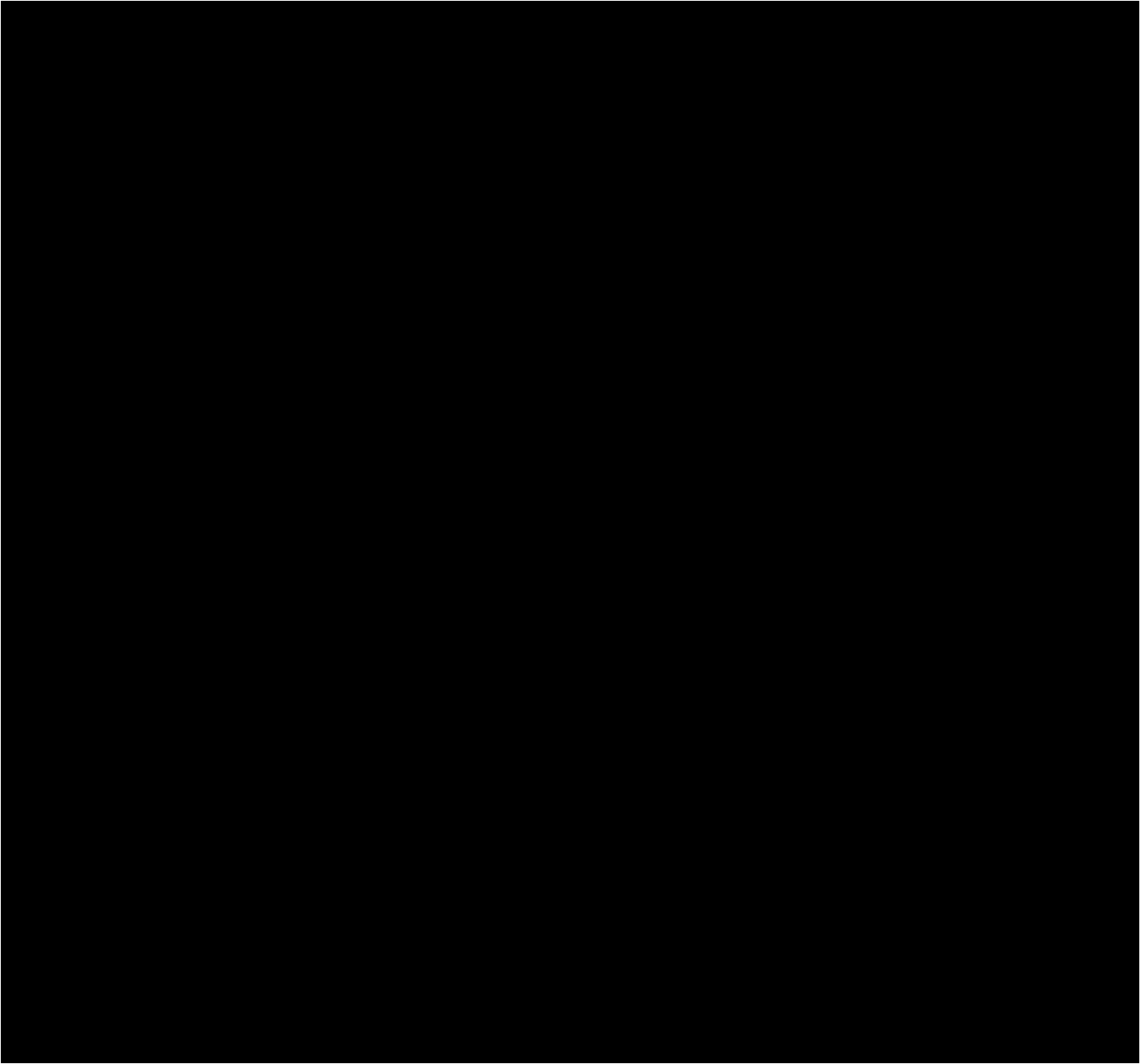
5.7 Method of Approach

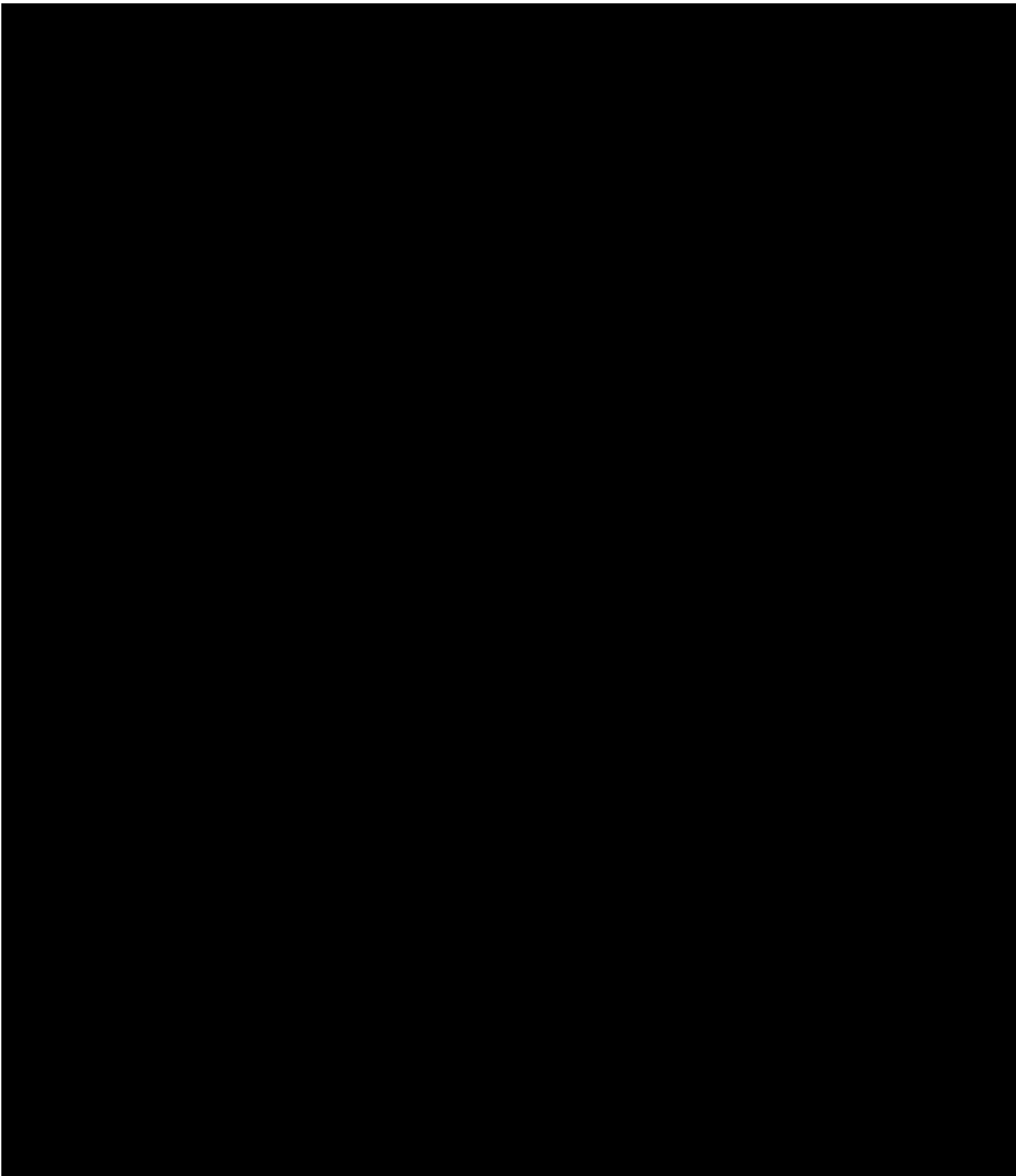
5.7.1. Method of Approach

Proposed initiative management methodology and approach to fulfilling the requirements of this initiative. (Limit 5 pages)









5.7.2 How Vendor will Satisfy Requirements

5.7 Method of Approach

5.7.2. High level narrative description of how the vendor will satisfy each of the requirements in the matrix. (Limit 5 pages)

Deloitte's AI-Enhanced Solution for AHCCCS Contact Center Modernization

Deloitte leverages AHCCCS's existing Genesys and ServiceNow platforms, seamlessly infusing advanced, cloud-native AI and automation without requiring replacements or operational disruption. Our integrated architecture enables smarter, more responsive service across all channels, supporting automation, advanced analytics, and agile digital engagement.

Our solution maps to each of the requirements in the matrix. Our approach to meeting the AI Call Center Requirements is summarized below. We have responded to Global Requirements, Security, SLA and Deliverable Requirements in the Completed Matrix.

Seamless Integration and Enhanced Operations

- **Unified Agent Workflows:** Agents manage tasks, assignments, and tickets through streamlined workflows within Genesys and ServiceNow, supported by unified dashboards. Deep API integration and comprehensive security safeguard transparency, traceability, and accountability at every member touchpoint.
- **Rapid Mobile Enablement:** Using AI mobile tools, we create role-based, real-time mobile interfaces for field staff, empowering service teams anywhere, anytime.
- **AI-Driven Routing:** Our solution leverages AI and Natural Language Processing (NLP) to detect intent, language preferences, and agent-skills, dynamically matching members to the best resource and enabling digital assistants for efficient inquiry resolution.
- **Automated Case Management:** Every follow-up needed creates a ServiceNow case with mapped member information. Automated updates and notifications keep members informed throughout their journey.

Scalable, Secure, Resilient Cloud Foundation

- **Interoperable by Design:** Our modular, standards-based architecture uses modern APIs, secure authentication, and flexible data formats to support both current/future workflows and connections to state/federal systems.
- **High Availability & Scale:** Deployed on a multi-zone, redundant cloud, we guarantee 99.9% uptime. Automated failover provides confidence that inquiries always reach a live agent if any service degrades.
- **Predictable Support:** Modular AI, NLP, and integration adapters operate as distinct, upgradable components. Automated releases are implemented with new features rolling out with zero/minimal downtime and no surprise costs.

Omnichannel, Accessible, and Automated "No Wrong Door" Experience

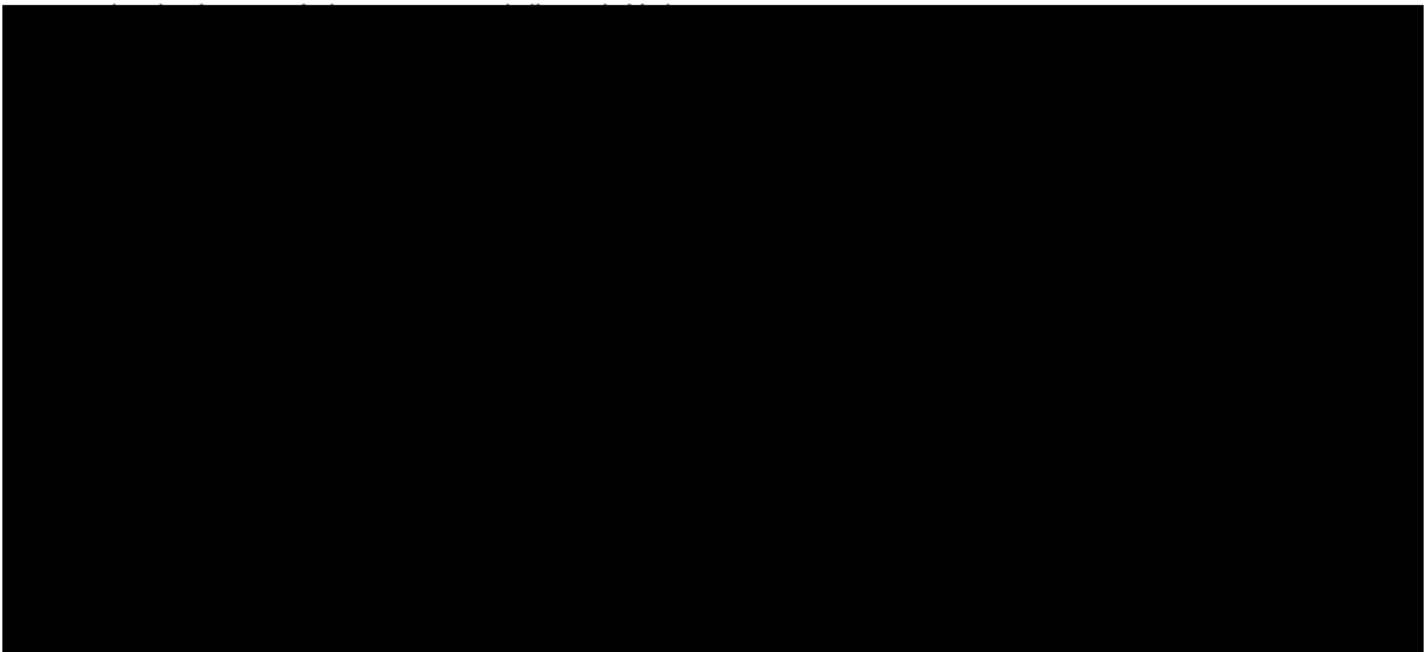
Deloitte's omnichannel solution across voice, chat, SMS, email, social, and in-person, removes barriers and creates a frictionless "No Wrong Door" environment for every AHCCCS member.

Omnichannel Touchpoints & Accessibility

- **True Channel Continuity:** Members can start a conversation in chat, move to voice, and return to chat with context, history, and authentication preserved across channels.
- **Effortless Transparency:** Members may access transcripts and records, reinforcing communication clarity and trust.
- **Universal Access:** All major communication methods including TTY/TDD, 711 Relay, and multi-language options are available for both equity and ADA compliance.
- **Callback Convenience:** Members can request instant or scheduled callbacks, with current wait times displayed, reducing frustration during peak periods.

Intelligent Automation at Every Interaction

GenAI enables a seamless journey and interactive experience for customers like Janet,



- **AI-Driven Workflows:** Our solution orchestrates eligibility checks, claims, provider lookups, prior authorizations, and more, capturing key information accurately via voice or text.
- **Context & Task Automation:** Automated prompts and persistent session information are captured, so no details are lost, minimizing member repetition and agent effort.
- **Smart Routing and Self-Service:** Calls and inquiries are routed based on need, skill, and context. The solution leverages AI to resolve routine inquiries, with seamless escalation to agents when needed.

Continuous Improvement and Insight

- **Unified Analytics:** Real-time dashboards and advanced analytics from both Genesys and ServiceNow deliver live views of operations, automated surveys, and key performance indicators. Configurable reporting, SLAs, and performance data uncover trends and drive ongoing improvements.
- **Workforce Optimization:** Supervisors leverage tools for scheduling, demand forecasting, and quality assurance, monitoring all channels and adjusting assignments or training to maximize effectiveness.
- **Knowledge Management:** Agents and members benefit from central, version-controlled knowledge bases and FAQs, dynamically surfaced during interactions to increase First Call Resolution (FCR) metrics.

Member-Focused Experience

- **Empowered Participants:** Secure role-based access, self-service, and policy-driven support for all users. Automated follow-ups, notifications, and case summaries keep everyone informed and engaged throughout their service lifecycle.
- **Holistic Data Management:** End-to-end workflow tracking, robust identity/profile management, and workflow automation drive quality, efficiency, and compliance.

Deloitte's approach helps AHCCCS realize the full potential of its Genesys and ServiceNow investments delivering superior service quality, resilience, and adaptability. Our flexible, standards-based solution is built to grow, modernize, and evolve with your mission and community.

Next-Gen Self-Service and Digital Experience

Deloitte enhances AHCCCS's Genesys and ServiceNow platforms by integrating robust AI, automation, and intuitive design. This device-agnostic, plugin-free solution enables Medicaid members, providers, and agency staff to access services and manage information with ease across channels.

- **Empowered Self-Service:** Advanced AI and Natural Language Understanding allow for around-the-clock virtual agents across all channels, resolving routine inquiries and promoting frictionless self-service.
- **Personalized Portals & Knowledge Access:** Our solution's self-service portal delivers content, guidance, and communities tailored to each user's profile. Members and providers can find resources, submit requests, schedule appointments and interact with virtual agents through streamlined, device-optimized interfaces.
- **Workload Balancing & Decision Support:** AI-driven routing, presence indicators, and workload dashboards allow teams and supervisors to dynamically balance resources in real time, enabling efficient case handling.
- **Feedback and Continuous Improvement:** Mobile-friendly surveys capture actionable insights during the user journey, fostering ongoing service innovation.
- **Omnichannel Scalability:** Embedded messenger widgets and APIs deliver a consistent experience across all channels, with consistent branding and context.
- **Comprehensive Service Management:** Constituents can use AI-powered self-service channels to manage appointments, view queue status, submit documents, and track requests. Detailed histories and notifications deliver transparency and proactive engagement.
- **Agent Workspace and Next-Best Action:** Transforming the agent experience is central to the Deloitte's approach. Agents benefit from a unified, ADA-compliant workspace that brings real-time, context-aware information to the forefront, allowing for quicker decision-making and improving FCR metrics.
- **Centralized Context-Sensitive Dashboards:** The agent workspace gathers case histories, relevant knowledge articles, incidents, and catalogs, making actionable information instantly available within agent workflows.
- **Guided Decision-Making:** Dynamic decision trees leverage AI to assist agents by quickly adapting to live case circumstances and provide agents with recommended next best actions, automating resolution steps, and presenting clear guidance for even the most unfamiliar of scenarios.
- **Streamlined Documentation:** Agents can access and attach community posts, support items, and context notes directly to cases, supporting fast, well-documented resolutions.
- **Role-Optimized Views:** Custom landing pages designed for specific teams or roles improve usability and help agents concentrate on high-priority or complex cases.
- **Workload and SLA Monitoring:** Dashboards highlight case priorities and forecast resolution timelines, with prominent warnings for potential SLA breaches, enabling proactive case management.

Agent Co-Pilot, Automation, and Collaboration

The Agent Co-Pilot introduces transformative AI-powered support, further elevating the agent's experience and operational efficiency. By providing real-time guidance, relevant knowledge suggestions, and automated workflows

during customer interactions, the Agent Co-Pilot enables agents to resolve issues faster, reduce manual effort, and improve service quality resulting in more consistent and satisfying customer experiences.

- **Contextual Digital Assistant:** Co-Pilot summarizes case actions and provides recommended next steps delivering actionable insights as cases evolve while retaining key information post-resolution.
- **AI-Bot Delegation:** Live chat sessions can be delegated to virtual agents for structured data collection or guided troubleshooting yet easily resumed by agents as needed for seamless customer journeys.
- **Professional Environment Assurance:** Real-time chat profanity filtration upholds communication standards, with proactive supervisory alerts in line with AHCCCS policies.
- **Personalization and Analytics:** Agents customize dashboards for team and individual metric tracking and share insights securely. Integrated experience analytics help supervisors monitor usage, adoption, and process efficiency driving continuous environment improvement.
- **Balance and Well-Being:** Workload balancing tools, coupled with agent customization, create a flexible and supportive environment, leading to faster resolutions and improved member/provider interactions.

Maintenance and Operational Support

Deloitte will deliver comprehensive Maintenance and Operations services so that the Arizona Contact Center remains resilient, adaptive, and fully compliant with ever-evolving requirements. Our maintenance support spans routine and corrective activities, including software, hardware, and network upgrades, configuration and data corrections, the integration of State rule changes, and the prompt application of change requirements. We will execute root cause analysis, generate stakeholder communications, and enable continuous improvement through both preventive and adaptive maintenance. Collaboration with source system contractors is embedded into our process. Data integrity issues are addressed swiftly, in alignment with established data quality review timelines. Deloitte's proactive approach also encompasses rigorous audit activities and transparent reporting, supporting the State with regular reviews of automated and manual business and technical processes.

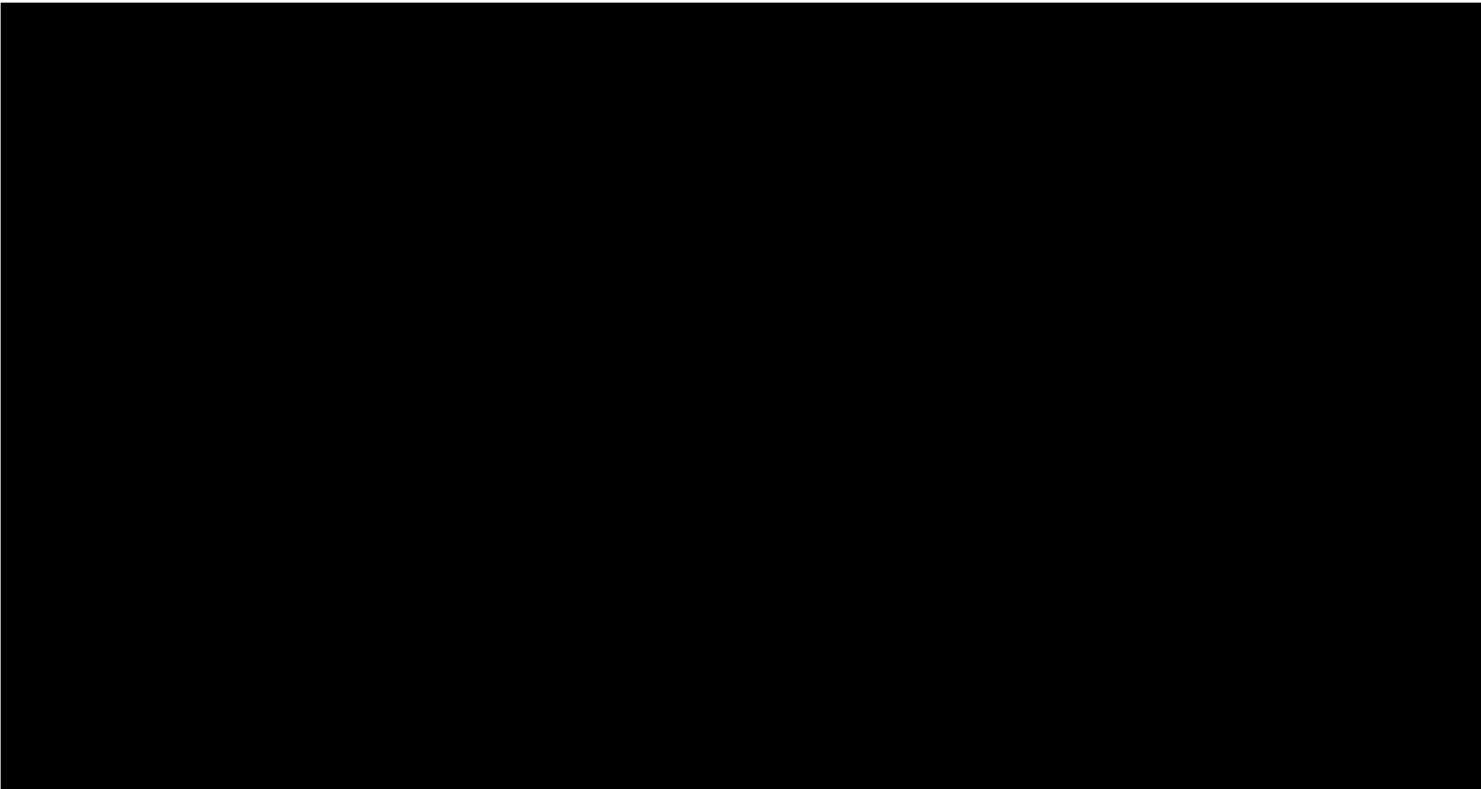
Operational excellence will be driven by Deloitte's end-to-end oversight, and accountability for all system environments, service levels, and performance metrics will consistently meet or exceed agreed-upon thresholds. Production support will be delivered around the clock, 24/7/365, including business-hour technical support, rapid fault detection, timely resolution, and, when required, the deployment of workarounds to minimize operational disruption. Deloitte will coordinate both scheduled and emergency maintenance windows in close partnership with AHCCCS and impacted solutions, so that no action is taken without appropriate notifications and/or approvals. Our defect resolution process is governed by an AHCCCS-approved triage and escalation mode so that every issue is prioritized and resolved according to its severity, giving stakeholders confidence in both the responsiveness and reliability of the contact center's operations.

5.7.3 Proposed Timeline

5.7. Method of Approach

5.7.3. High-level proposed schedule to meet the objectives for AHCCCS anticipated timeline for implementation.

The State of Arizona Contact Center Modernization Deployment Timeline outlines the key phases and milestones driving the successful transformation of the contact center environment. Starting in April 2026, this plan methodically progresses from discovery and design to full rollout and go-live, delivering a structured and collaborative approach at each stage. The visual timeline highlights the sequencing of major activities such as requirements gathering, architecture, system build, validation, training, and deployment, marking critical deliverables and decision points to keep the initiative on track. This phased delivery provides clear expectations around timing, promotes transparency, and supports effective change-management for all stakeholders involved in the modernization effort.





PART B

B3 Solution Overview



Solution Overview

5.8 Solution Overview

5.8. Describing your technical approach to fulfilling the requirements outlined in the Global Requirements (Requirements Matrix). (Limit 10 pages)

Solution Overview

AHCCCS is embarking on a bold modernization journey to transform its contact center into an AI-enabled, omnichannel experience hub elevating services for both customers and staff. Deloitte’s integrated solution leverages the strengths of Genesys and ServiceNow, expanding on AHCCCS’s established platforms to create a unified, intelligent, and future-ready contact center without disrupting ongoing operations.

Our solution delivers natively embedded AI capabilities across web, mobile, voice, chat, email, SMS, social channels, and in-person visits. By integrating Genesys for seamless client engagement and ServiceNow for empowered agent experiences, AHCCCS can orchestrate every step of the customer and staff journey through a single, modern interface. This enables real-time coordination of people, channels, data, interactions, and AI-powered assistants for rapid issue resolution and streamlined service delivery.

 **INNOVATING
WITH INTENT**

Key Advantages of the Genesys + ServiceNow Solution

- **Unified, Omnichannel Experiences:** Engage customers seamlessly across all preferred channels.
- **AI Driven Personalization and Automation:** Use AI tools to automate tasks and personalize every customer interaction
- **Effortless Integration and Improvement:** Enhance workflows with analytics and automation – no disruption to current operations.

Audit Trail Documentation

Req #	GR01
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Deloitte draws on extensive Genesys and ServiceNow experience to deliver comprehensive audit trail documentation for data and process changes. We utilize both out-of-the-box record tracking and tailored audit reports to capture user, timestamp, and before/after state for any transactions in Genesys and ServiceNow. Our teams have successfully implemented role-based audit dashboards for health agencies, providing real-time and historical views by permission level. If AHCCCS seeks more granular reporting, Deloitte uses Genesys and ServiceNow's API integration to consolidate logs across systems, enabling advanced analytics and helping staff quickly investigate events and meet compliance needs. Audit trails are available for document-, workspace-, administrative-, and system-level actions, with employees able to see document-level changes for their files, and administrators able to view broader changes. Role-Based Access Control (RBAC) provides that audit information is accessible online according to assigned permissions.

Certification

Req # GR02

Deloitte's methodology applies risk management and compliance scorecards that align with Genesys,, ServiceNow, CMS and AHCCCS criteria. Our team identifies non-compliance risks early, providing reporting and insight to support agency readiness for CMS oversight and reduce the risk of penalties. Additionally, the proposed solution adapts quickly to regulatory changes, updating leadership through regular communications allowing for adjustments to contracts and operational processes as necessary.

Change Management

Req # GR03

Change management is an important part of the systems life cycle, ensuring that AHCCCS can meet evolving needs. Our proposed solution's Change Management functionality supports all system modifications, configurations, and deployments. The platform enforces formal change approval workflows, requiring reviews before implementing changes to production environments. Change records document what is changing, why changes are needed, who approved the changes, detailed implementation plans, and rollback procedures.

The solution maintains separate development, test, and production environments, enabling proper change testing before production deployment. The SNOW change management framework includes impact analysis, which identifies affected components and potential risks, and calendars that provide visibility into scheduled changes to prevent conflicting implementations.

Additionally, the solution tracks change success rates, implementation times, and rollback occurrences to drive continuous improvement. The platform integrates change management with release planning to enable coordinated, multi-component deployments. Comprehensive change audit trails document the complete history, including approvals, implementations, and post-implementation reviews.

Cloud Architecture

Req # GR04

Our solution is purpose-built to fully leverage the state's architecture, with seamless integration and alignment with high availability standards provided by Genesys and ServiceNow platforms. By utilizing multiple Availability Zones for synchronous replication in an active-active-active deployment, we offer continuous service that is resilient even if one zone is disrupted. This design guarantees protection against data loss and supports always-on operations within the state environment. Automated failover, load balancing, and self-healing mechanisms capitalize on the strengths of the state architecture to drive rapid recovery and reliable system performance. Additionally, we regularly carry out business continuity and disaster recovery tests to uphold and validate the solution's ongoing reliability.

Contract Management

Req # GR05 – GR19

Contract management is crucial to successful project implementation. Deloitte will provide comprehensive contract management, including regular communications, recurring progress reporting, annual security assessments, rapid

invoicing controls, records management, rapid access deactivation, subcontractor monitoring, and formal processes for contract changes, audits, and corrective actions.

Deloitte will leverage secure, State-approved systems to organize meetings, maintain contract communication, and manage the documentation and archiving of decisions as outlined in the Communications Management Plan. We will prepare and deliver all required reports, including status updates, audit results, and requested legal documentation, using centralized and accessible repositories. All invoicing will be routed electronically with detailed supporting documents and timely corrections when necessary.

For security, annual independent third-party assessments will be coordinated and formally reported to AHCCCS. Deloitte will also develop and provide a Corrective Action Plan (CAP) process and template that meet AHCCCS requirements as detailed in the Quality Management Plan. Any CAPs will be documented, submitted for State approval, and implemented with full tracking of remediation activities. Lastly, subcontractor agreements, contact details, and compliance records will be supplied as requested, with compliance actively monitored. Throughout, Deloitte will document, report, and collaborate as directed to support the contract and operational needs.

Deliverables and Document Management

Req # GR20 – GR21

Deloitte will deliver all key project materials on time and secure State approval as outlined in the project schedule. We use robust version control tools, integrated with the State's content management system, to manage changes and keep a clear audit trail accessible to the State. Our team collaborates with State-approved document management processes to maintain transparency and alignment throughout the project.

Informed Consent

Req # GR23

Protecting privacy and securing consent are top priorities for Deloitte when it comes to Arizona residents.

The proposed solution allows call flows to be designed so that customer consent is obtained before call recording begins. Call recording does not start prior to the caller's consent, and flow authors can configure call flows to let callers decide whether they want the call recorded. Administrators must configure the trunk hosting the calls to allow line recording and to obtain customer consent before recording. If the customer does not give consent, the solution does not start recording the call, and the call is handled and routed to an agent according to the inbound voice distribution strategy.

Infrastructure Management

Req # GR24 – GR33

Deloitte's infrastructure management emphasizes proactivity, operational excellence, and clear communication. We provide and support secure network connectivity, tools, and data access for seamless interaction with all contracted applications. Our team actively manages maintenance, licensing, vendor support, and upgrades to provide a robust, up-to-date environment that aligns with State objectives and minimizes burdens on State resources. Each software component is monitored for vendor support status, with upgrades and replacements scheduled in coordination with the State. Users benefit from automated upgrades, high availability, and actionable performance alerts. Routine maintenance, clear reporting, and data retention policies support ongoing compliance and iterative improvement.

Regular performance and capacity reports inform planning and scaling decisions. Deloitte collaborates with the State to build a tailored Performance Management Plan outlining monitoring, benchmarks, and responsive reporting protocols, ensuring resilience and transparency. We promptly communicate upgrade requirements, end-of-support dates, and security interventions, with all change and test plans documented and submitted for State review, helping minimize risk and maintain service continuity.

Maintenance and Operations

Req # GR34 – GR45

Deloitte will provide comprehensive, fixed-price Maintenance and Production Support throughout Operations. This includes proactive system changes, routine and emergency maintenance, extensive stakeholder coordination, and continuous compliance with AHCCCS standards.

Communication, Coordination, and Compliance	
Function	Activities Covered
Stakeholder Engagement	Proactive notification and coordination with AHCCCS and partners on maintenance windows or system outages, with required approvals
24/7 Support	Continuous technical and system support, including response during defined call center hours and always available system readiness.
Audit & Documentation	Regular audits of business and technical processes; all incidents and outages are documented following AHCCCS policy.
Defect and Maintenance Planning	Defect resolution managed per AHCCCS-approved processes and timelines, with standard maintenance windows documented and coordinated.
SysMSP	Continuous delivery and updates of the SysMSP to demonstrate system readiness and alignment with AHCCCS requirements.

Performance Management

Req # GR46 – GR47

Deloitte acknowledges and understands the State's requirements surrounding Performance. We will bring a multi-party governance methodology and the necessary experience to successfully support the vision, goals, and objectives of the AHCCS team.

Performance Management	Deloitte will work with AHCCCS to...
Scheduled Reviews	Provide status updates and discuss issues and risks regarding SLAs and KPIs as directed by AHCCCS. We will work with AHCCCS to determine key topics, keeping stakeholders aware and informed. Establish a minimal monthly meeting for enterprise-level project review
Deliverables	Design a client status report and a scorecard with parameters and metrics conducive to report project status, health, SLAs and KPIs.

The solution enhances KPI and SLA monitoring with real-time dashboards and periodic scheduled reporting. When issues arise, Health Checks and evaluations produce actionable recommendations that support performance improvements.

Quality Assurance and Quality Management

Req # GR53 – GR59

To help AHCCCS achieve its quality goals and align personnel activities with business objectives, Deloitte’s quality assurance team will monitor and review calls and cases for accuracy, driving improved performance, mission support, and customer satisfaction.

Our solution offers comprehensive quality assurance and evaluation features through Engagement Management (WEM), allowing monitoring of every interaction, standardized evaluation, and agent development. Conversations are automatically recorded based on configurable policies, and evaluators use digital scorecards and AI-assisted analytics to streamline reviews, ensuring regulatory compliance and continuous improvement. Genesys Cloud’s integrated quality tools enable quality administrators to create evaluation forms, manage policies, and monitor performance for consistent, comprehensive oversight.

AI-powered conversational analytics rapidly identify interactions for review, detect issues promptly, and measure key metrics such as CSAT, AHT, first contact resolution, and customer sentiment. Native tools support benchmarking, including Net Promoter Score (NPS), and allow integration with third-party solutions. All interactions are securely retained for audit, with screen and desktop recording available for complete performance assessment. These capabilities help AHCCCS achieve and exceed CMS performance benchmarks and meet the requirements of State-approved Quality Management Plans.

Release Management

Req # GR60

Deloitte has a well-established methodology for release management that has been honed through decades of experience. We have learned that a well-organized and consistent release process leads to higher-quality releases and end-user satisfaction. We will provide scripts, documentation, and release notes for all releases which will help AHCCCS users and stakeholders stay informed and up to date on the changes being made in each release.

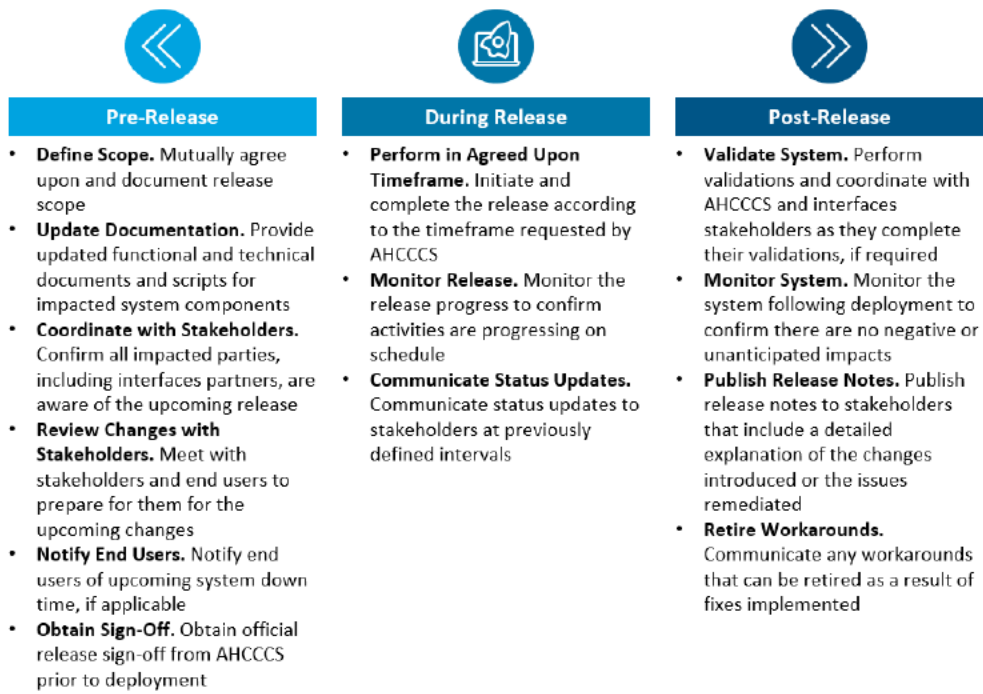


Figure 17: Release Management

Reporting and Data Compliance

Req # GR61 – GR64

Deloitte will work closely with AHCCCS teams to align all processes with state and federal data standards, including NIEM, HIPAA, HL7, XML, and TIPS. Our experts will help configure, monitor, and maintain these integrations so that new regulatory requirements are adopted efficiently and with minimal disruption to business as usual.

For auditability, Deloitte will enhance the accessibility and use of Genesys and ServiceNow’s audit log features. We will set up clear user interfaces and access controls so authorized AHCCCS personnel can easily view relevant audit trails, provide transparency while maintaining strict data security.

We take a proactive approach to operations, continuously monitoring call volumes, agent performance, and infrastructure health through ServiceNow’s ITOM tools and Genesys analytics. Deloitte’s management team will make rapid, informed adjustments to staffing and technical resources whenever needed, keeping operations stable even in periods of change or unexpected demand.

Regarding data quality and analytics, Deloitte will implement routine assessment cycles and provide clear, actionable reports powered by both platforms. We will consult with AHCCCS to tailor dashboards, KPIs, and ad hoc analyses, supporting ongoing service improvement and delivering insights whenever they are required by state leaders.

While the proposed solution does not natively implement each of these standards internally (e.g., it is not an HL7 engine), it fully supports exchanging, transporting, and processing data that conform to these standards through its integration framework. It leverages flexible APIs and comprehensive audit logs to align with standards. Features also include real-time monitoring and automated scaling. Data quality is monitored through integrated analytics and flexible reporting.

Training

Req # GR65

Deloitte’s training program is built leveraging the industry standard Analyze, Design, Develop, Implement, and Evaluate (ADDIE) approach. Our ADDIE training approach focuses on iterative design and development, allowing us to use and repurpose learning content as we progress through training delivery.

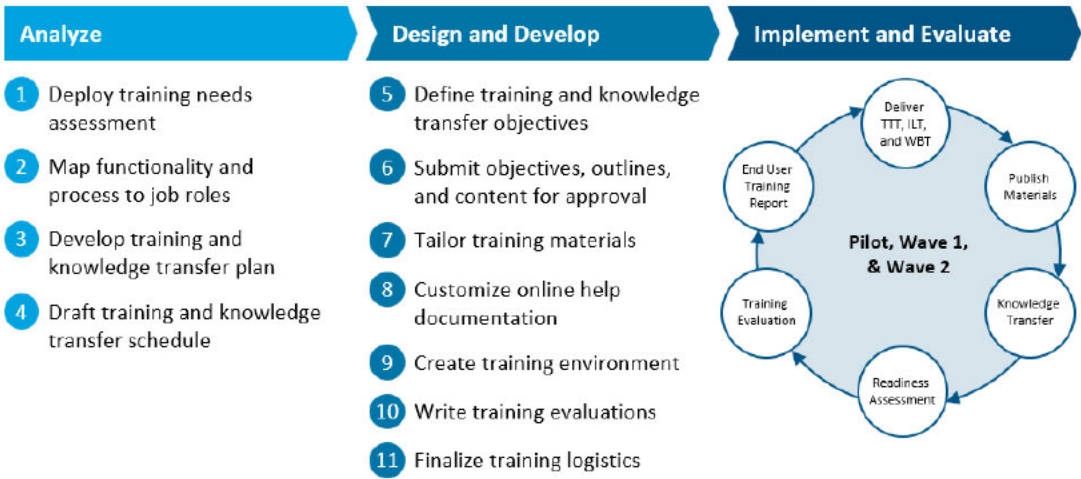


Figure 18: Deloitte’s ADDIE Approach

Working alongside AHCCCS, Deloitte’s approach will provide staff with intentional, comprehensive training on the functionality and features that they will use in the new system. Training is available through multiple modalities – such as instructor-led (virtual), self-study, and eLearning – allowing flexibility to match the team’s needs and schedules.

Compliance Standards

Req # GR66

A call center solution leveraging ServiceNow integrated with Genesys can meet HIPAA, NIST, HITECH, and FIPS requirements when both platforms are deployed in their compliant environments and are configured according to best practices. Both Genesys and ServiceNow offer features and certifications supporting these standards, such as robust data encryption, access controls, and audit capabilities. However, compliance ultimately relies on the correct configuration of security settings, careful management of data flows between systems, and execution of necessary agreements, such as Business Associate Agreements for HIPAA. Ongoing governance, monitoring, and timely updates are also essential to maintaining compliance across the integrated solution.

Test and Training Environment Reporting

Req # GR67

Deloitte establishes separate, fully functional environments for testing and training, closely replicating the configuration of the live system. AHCCCS’s Quality Assurance and Training teams are invited to use these spaces for previewing new features, test workflow changes, and conduct staff training in advance of each release. Our team will coordinate access logistics, aligns data refresh cycles with project milestones, and remain available to support scenario testing and feedback, helping AHCCCS verify that updates deliver the intended outcomes before rollout.

These sandboxes can be created as a new organizational instance tailored to AHCCCS’ needs. While there is no automatic sync between sandbox and production environments, these environments support configuration management across development, test, and production. User Acceptance Testing (UAT) is also supported, allowing teams to validate changes against business requirements prior to go-live.

Service Request ROMS

Req # GR68 - GR70

When AHCCCS submits a service request, Deloitte promptly reviews the details and responds within the expected timeframe for the request’s assigned priority. Our response will outline a tailored approach for meeting the need,

accompanied by a cost estimate and a realistic timeline covering the stages from design through implementation. If more time is needed to develop a thoughtful proposal, we will always consult with the State before proceeding.

As work evolves and new information comes to light, we revisit and refine our estimates, keeping the State updated with any changes in anticipated resources or duration. This approach keeps expectations aligned throughout the process and offers clear visibility into progress and project impacts.

We are committed to open communication and flexibility, aiming to foster collaboration and transparency with AHCCCS through each stage of service delivery. If you’d like to see examples of how we provide these estimates or want more detail about our request management workflow, we’re ready to share further information tailored to your needs.

System Performance/Monitoring

Req # GR81 – GR87

Deloitte will perform system monitoring activities that are focused on availability, reliability, and overall performance. Our solution will integrate with existing production-proven tools associated with the platforms, along with processes from our experience in other States.

Deloitte will perform system monitoring activities that are focused on availability, reliability, and overall performance. Our solution will integrate with existing production-proven tools associated with the platforms, along with processes from our experience in other States.

- **System Reliability and Growth:** Our alignment with the platform architecture enables the Genesys and ServiceNow platform distributed cloud resources, automated scaling, and fault-tolerant designs to maintain consistent service levels during periods of heavy use or disruptions.
- **Business Continuity Strategy:** We provide a resilience program built on NIST guidelines, combining comprehensive documentation, geographically separated data backups, and regular simulation exercises to keep recovery procedures effective and actionable.
- **Modern Browser Support:** The solution is tested against leading browsers compatible with current web technology standards, providing a consistent user experience at launch and beyond.

- **Maintenance Coordination:** System updates are timed in close collaboration with AHCCCS, using strategic deployment windows and user communications to keep service impact to a minimum.
- **Ongoing Compatibility Validation:** Testing protocols verify that new components or upgrades remain compatible with established AHCCCS integrations, with detailed results tracked and communicated for each release.
- **Release Management:** All updates and enhancements are scheduled and delivered through structured governance, adhering to client timelines and oversight.
- **Performance Insights and Reporting:** Real-time dashboards present actionable business metrics, with options to explore data, generate reports for oversight agencies, and monitor remediation efforts for any gaps in service commitments.

Moreover, the solution provides high availability and scalable infrastructure through Genesys and ServiceNow platforms. Automation, continuous monitoring, and disaster recovery planning align with leading standards. Performance dashboards present data for both real-time tracking and retrospective review.

Testing Management

Req # GR88 – GR90

We partner closely with the State and AHCCCS, seamlessly integrating with State-led testing processes while also applying Deloitte’s adaptive testing strategies to optimize scalability and performance outcomes. Our teams quickly analyze results, identify opportunities for improvement, and make targeted enhancements to meet or exceed Service Level Agreement benchmarks.

When discrepancies arise, Deloitte leverages expert analysis and cross-functional resources to resolve issues efficiently, minimizing delays and maintaining solution integrity. Our agility in updating or replacing program data further supports ongoing testing and operations.

Deloitte’s Test Management Plan is not a static document, but a living framework designed to accommodate comprehensive testing – including functional, integration, performance, and user acceptance – while remaining flexible to evolving project needs. This approach allows us to address project complexities and respond dynamically to new testing requirements.

Our test environments are reliably provisioned with relevant, compliant data meeting AHCCCS specifications and regulatory standards. The test data runs in a completely separated environment from the production and production data is not used in development or testing.

Transition Management

Req # GR91– GR92

Deloitte adopts a methodical and client-focused approach to transition management. We will inventory and transfer all software and service licenses with full support documentation. Our team coordinates closely with AHCCCS to transfer cloud accounts, provide complete system inventories, and deliver all relevant access control settings – including users, roles, and security policies – using secure and well-documented procedures.

We maintain and hand over Infrastructure as Code assets along with clear documentation to enable smooth operational handoff. Security and compliance records, including audit logs, monitoring data, SIEM information, and vulnerability management reports, would be provided for all required historical periods. Data backups would be delivered in requested increments and formats. Additionally, disaster recovery documentation, including failover and recovery routines, would be transferred, and targeted training would be provided as needed.

Throughout the process, Deloitte emphasizes thorough documentation, proactive communication, and tailored knowledge transfer to support continuity and minimize business disruption.

User Access

Req # GR93

Our approach centers on providing secure, well-controlled user access within the integrated Genesys and ServiceNow platforms for the AHCCCS call center. User access processes make sure that agents, supervisors, and other relevant staff are provisioned with the correct roles and permissions based on business requirements. Updates to access are managed through a standard, auditable workflow, which safeguards sensitive state and federal data while allowing staff to have the resources they need to perform their roles.

Direct access to federal or state data is not automatically available in the solution. Instead, data is accessed via secure APIs and role-based controls for those with appropriate permissions.

Technical User Support

Req # GR94 – GR95

Deloitte will implement a structured cadence of problem review meetings in partnership with AHCCCS to drive transparency, issue resolution, and process improvement. Our technical solution will be designed with scalability, modularity, and reusability at its core, delivering sustainable value for AHCCCS both now and into the future. As part of our defect triage meetings, we will provide problem impact categorization and review sessions for incidents and talk through next steps with the required or impacted stakeholders.

Data Management

Req # GR96

Deloitte will align all data exchanges with the existing AHCCCS data sharing agreements, carefully reviewing protocols before accessing State or Federal Hubs. Our experienced team manages sensitive data with rigor and consistency, maintaining compliance and reinforcing trust with all stakeholders.

Technical Architecture

Req # GR97

Deloitte uses separate environments for Development, QA Testing, UAT, Training, Pre-Production, and Production, each with a specific role in the solution delivery lifecycle. All non-production environments are populated exclusively with test (mockup) data that emulates real-world business scenarios. This data supports comprehensive and accurate testing, training, and user validation while protecting sensitive information. Data masking, anonymization, or synthetic data generation techniques are applied so that no live production data is used outside of the production environment. QA Testing and UAT use full-sized mockup datasets that are regularly refreshed and reflect the structure and complexity of the live system to support operational workflows. The Training environment uses anonymized or synthetic data that represents business situations, allowing for risk-free user education and onboarding. Pre-Production acts as a final deployment checkpoint and operates with cloned and anonymized datasets to support readiness activities prior to go-live. The Production environment contains the actual operational dataset and applies all necessary security and compliance controls. Deloitte employs configuration management, access controls, and automation across all environments to maintain consistency, efficiency, and protection of data.



PART B

B4 Completed Requirements Matrix



5.9 Completed Requirements Matrix

5.9 Completed Requirements Matrix (please fill in the last two columns on each tab)

Completion of Attachment 5: Following the task order instructions, we have completed and uploaded the Requirements Response Matrix to the bidder’s submission folder under ‘AHCCCS Call Center AI Integration Vendor RRM.’



PART B

B5 Pricing Proposal



5.10 Proposed Pricing

Proposed Pricing:

- 5.10.1. Be advised that all pricing must be inclusive of all costs associated with your solution. No other expenses (i.e. TRAVEL or PER DEIM) will be paid.
- 5.10.2. Complete pricing document Solution pricing structure document.
- 5.10.3. Please note that the vendor rate card and/or block of hours are for new development (if needed) only, and SHALL NOTE BE USED for required design, implementation, required elements and M&O of the proposed solution.
- 5.10.4. Please note that the Software and License costs should include licensing costs for each component of the Solution, which will be hosted in the AHCCCS Azure environment. AHCCCS will host the Solution and retain ownership of the licensing for each component.

Completion of Attachment 2: Following the task order instructions, we have completed 'Attachment 2 AI Call Center Integration Pricing Schedule' and uploaded it to the bidder's submission folder.



PART C

C1 Legal Analysis for Confidential/Proprietary Determination



C1. Separate, Signed, Legal Analysis for Confidential/Proprietary Determination

C1. Separate, Signed, Legal Analysis for Confidential/Proprietary Determination (if any)

In accordance with Section 14 (Request for Confidential/Proprietary Determination) of the Task Order Instructions to Offerors in the above-referenced Task Order, this legal analysis serves to identify the information contained in Deloitte Consulting LLP's proposal (the "Deloitte Proposal") which it claims to be confidential and exempt from public disclosure (the "Protected Information").

Deloitte Consulting LLP ("Deloitte Consulting") provides professional consulting and advisory services to government entities and companies around the world. This services market is a dynamic market with many participants vying for a limited universe of clients. In this regard, Deloitte Consulting objects to the release of certain information included in the Deloitte Proposal on the basis, among other things, that it will cause competitive harm to Deloitte Consulting if it is released by the Arizona Health Care Cost Containment System ("AHCCCS").

Preliminarily, the Arizona Administrative Code at A.A.C. R2-7-103 provides a process whereby a bidder may assert that its solicitation response contains a trade secret or other proprietary information that should be withheld from public disclosure. A bidder is required to clearly designate any trade secret and other proprietary information in its bid and include with its submission a statement supporting its assertion that such information is confidential trade secret information. For purposes of this process the definition of trade secret is set out in A.A.C. R2-7-101(51).

"Trade secret" means information, including a formula, pattern, device, compilation, program, method, technique, or process, that is the subject of reasonable efforts to maintain its secrecy and that derives independent economic value, actual or potential, as a result of not being generally known to and not being readily ascertainable by legal means.

As set forth below, the Protected Information is exempt from disclosure pursuant to the exemption contained in A.A.C. R2-7-103, which permits an agency to withhold trade secrets or other proprietary information, for two independent reasons. *First*, the Protected Information is *not* the kind of information that Deloitte Consulting customarily discloses to the public, and was provided voluntarily to AHCCCS with the reasonable expectation that it would not be released. *Second*, disclosure of the Protected Information would cause substantial harm to Deloitte Consulting's competitive position by permitting its competitors to leverage Deloitte Consulting's innovative business strategies, solutioning methodologies and approach, business references, biographic information on key personnel, and other proprietary information that provides insight into the internal operations of Deloitte Consulting; all of which have significant commercial value and represent the investment of substantial time, effort and money.

The Supreme Court of Arizona in *Carlson v. Pima County*, 141 Ariz. 487, 491, 687 P.2d 1242, 1246 (Ariz. 1984) ruled that "[w]hile access and disclosure is the strong policy of the law, the law also recognizes that an unlimited right of inspection might lead to substantial and irreparable private or public harm; thus, where the countervailing interests of confidentiality, privacy or the best interests of the state should be appropriately invoked to prevent inspection, we hold that the officer or custodian may refuse inspection." *See also Judicial Watch, Inc. v. City of Phoenix*, 228 Ariz. 393, 395, 267 P.3d 1185, 1187 (Ariz. App. 2011).

1. Proprietary Methodologies, Tools, Assets, Processes, Solutions, and Approach.

The Protected Information in this category reflects confidential information regarding the overall approach, processes, tools, procedures, and methodologies that Deloitte Consulting employs when conducting Medicaid Eligibility solution projects; the compilation of which Deloitte Consulting deems trade secret and proprietary information. Disclosure of this information would impair Deloitte Consulting's ability to successfully compete for future work by relinquishing our approach to competitors who may then fashion future proposals to utilize a similar strategy when competing against us. *See Tribal Behav. Health LLC v. Reeves*, 2022 U.S. Dist. LEXIS 112186, *31, 2022 WL 2290563 (D. Ariz. June 24, 2022) (a

trade secret may consist of a compilation of information that is continuously used or has the potential to be used in one's business and that gives one an opportunity to obtain an advantage over competitors who do not know of or use it.).

Our proprietary methodologies, tools, assets, processes, solution, and approach derive independent economic value from not being generally known to the public and cannot be readily ascertained or derived from publicly available information. This information is the subject of strong efforts to maintain its secrecy. For example, we routinely require our personnel, teaming partners and subcontractors to: (a) sign non-disclosure agreements; (b) implement reasonable security measures to protect information at their offices and in their computer systems; (c) limit disclosure of sensitive marketing and proposal materials to a select group of individuals on a strict need-to-know basis; and (d) we have made the effort to identify those sections of our proposal that we deem confidential.

In developing the Deloitte Proposal, Deloitte Consulting was required to use its ingenuity and originality to determine how best to accomplish AHCCCS' objectives of modernizing and streamlining its Medicaid Enterprise Systems (MES) operations, which is reflective of our market strategy. For example, the Deloitte Proposal provides valuable insight into Deloitte Consulting's NextGen solution accelerators, including confidential details regarding the technical design, functional architecture, and key components, features, and functionalities of its proposed solution, the disclosure of which would cause substantial injury to our competitive position. The Deloitte Proposal also reflects Deloitte Consulting's overall implementation plan and delivery strategy for the MES SI, including details regarding its setup approach, system security approach, data management strategy, data migration approach, testing and acceptance approach and training approach. This individual strategy and the proprietary SI platform, tools, assets, and accelerators used to implement the strategy allow Deloitte Consulting to effectively compete in the market, and if disclosed, would reveal Deloitte Consulting's individual approach to system modernization, integration, and implementation services, which to date has distinguished Deloitte Consulting among others in the health care and Medicaid market and contributed to successful contract awards. This information is not the kind of information that we customarily disclose to the public and is being provided to AHCCCS with the reasonable expectation that it will not be released. Accordingly, its disclosure would seriously undermine Deloitte Consulting's competitive advantage by allowing competitors to have access to Deloitte Consulting's ideas, designs, processes, and solutioning methodologies, all of which have significant commercial value and represent the investment of substantial time, effort and money.

The Deloitte Proposal further highlights Deloitte Consulting's industry-leading and differentiated experience implementing similar SI solutions for other state government agencies across the country and reflects information regarding Deloitte Consulting's internal business practices, including details regarding its staffing model and strategy, project management methodology, best practices, lessons learned, guiding principles, critical success factors, key differentiators, value-added benefits, and how the key features of our proposed solution and approach directly align with AHCCCS' project requirements; the compilation of which constitutes Deloitte Consulting's trade secret and proprietary commercial information. These details have not been disclosed outside of Deloitte Consulting's team except on a limited basis and only for the limited purpose of furthering the development of the underlying strategic approach and solution. Disclosure of this information would provide our competitors with direct access to Deloitte Consulting's individual approach to work, internal operations, and proprietary thought processes and strategy. Therefore, Deloitte Consulting seeks to protect such information from public disclosure.

Much of the substantive discussion throughout the Deloitte Proposal refers to Deloitte Consulting's proven methodologies and unique processes for delivering the requested services. Deloitte Consulting's methodologies and approaches are proprietary and are used repeatedly in its consulting work. Deloitte Consulting developed and continues to enhance and maintain these methodologies at considerable expense. The methodologies facilitate both efficiency and enhanced service quality, which give Deloitte Consulting a significant competitive advantage in bidding on projects, both in the public sector and commercial arenas. Because these methodologies reflect the expertise and experience of Deloitte Consulting, they are not easily replicated by a competitor, except through improper means. The release of this information to Deloitte Consulting's competitors would do considerable harm to Deloitte Consulting's competitive

position in this market by allowing its competitors to gain access to such content in order to mature their own capabilities and offerings in this space. Accordingly, such information is protected trade secret and proprietary information and should be withheld from public disclosure.

In addition, the Deloitte Proposal includes Deloitte Consulting's proprietary graphics, figures, tables, charts, diagrams, dashboards, sample reports, plans, deliverables, templates, screenshots, and other artwork; some of which depict the proposed technical architecture and illustrate how Deloitte Consulting's solution and approach will deliver the business specifications. The proprietary graphics reflect a general creative direction and approach that could be used by Deloitte Consulting with another current or potential client. This information is part of Deloitte Consulting's creative body of work that may be used in other proposals/projects. Disclosure of this information would place Deloitte Consulting at a competitive disadvantage by allowing its competitors to have access to and the ability to utilize the graphics that it expended considerable time and resources to design. Deloitte Consulting has marked these graphical items for protection against disclosure because they contain confidential information and the format is proprietary to Deloitte Consulting. Disclosure of the confidential information and the format would provide an unfair advantage to Deloitte Consulting's competitors, as they would then be in a position to use Deloitte Consulting's graphical format in proposals when competing against us.

This information has application well beyond the instant proposal and reflects Deloitte Consulting's experience with similar projects. Accordingly, its disclosure would seriously undermine Deloitte Consulting's competitive advantage by allowing competitors to have access to Deloitte Consulting's ideas, processes, and methodologies that they would not have had or would have had to spend considerable funds to develop on their own. *See SMS Data Prods. Group, Inc. v. Dep't of the Air Force*, 1989 WL 201031 at *3-4 (D.D.C. 1989) ("proprietary technical information" in successful offeror's technical proposal is exempt from disclosure under the FOIA); *Landfair v. Dep't of the Army*, 645 F. Supp. 325, 328-29 (D.D.C. 1986) (same for "technical designs"); *Prof'l Review Org. of Fla., Inc. v. Dep't of Health and Human Servs.*, 607 F. Supp. 423 (D.D.C. 1985) (same for "review process with an outline of data capability and processes"); *Audio Technical Services LTD. v. Department of the Army*, 487 F. Supp. 779, 782 (D.D.C. 1979) (same for "design recommendations" and "design concepts including methods and procedures"). Accordingly, disclosure of this Protected Information would impair Deloitte Consulting's ability to successfully compete for future work by relinquishing our approach to our competitors who may then fashion future proposals to utilize a similar strategy.

Further, Protected Information in this category is exempt from disclosure for the additional and independent reason that its release would jeopardize AHCCCS' ability to conduct business by decreasing the willingness of Deloitte Consulting and other contractors to include novel ideas in their written proposals or other submissions to the Government. *See Orion Research, Inc. v. EPA*, 615 F.2d 551, 554 (1st Cir. 1980) (technical information in successful offeror's proposal was exempt from disclosure under the FOIA because its release would "induce potential bidders to submit proposals that do not include novel ideas").

Based upon this Section, the provisions of the Deloitte Proposal as listed in the Submittal Letter and as further set forth in the redacted copy provided should be withheld from disclosure by AHCCCS.

2. Identities and Qualifications of Personnel and Subcontractors.

The Deloitte Proposal includes confidential information and protected trade secrets concerning the identities, qualifications, and relevant experience of individual Deloitte Consulting personnel and proposed subcontractors, including team member names, signatures, photographs, contact information, short bios, relevant project references, and resumes. *See 1 MILGRIM ON TRADE SECRETS §1.09[8][g]* (2020) ("...[b]usiness information which can be protected under a trade secret theory...[includes]...[i]nformation concerning...effectiveness and good sales performance of key sales and other personnel..."). Deloitte Consulting holds the identity of its personnel and proposed subcontractors in the strictest confidence.

Compilations or lists of Deloitte Consulting personnel and subcontractors, which often include details of specific, professional qualifications, included in the Deloitte Proposal are intended for use in Deloitte Consulting's business for the purpose of winning new business and these compilations have significant economic value. Disclosure of this Protected Information would injure Deloitte Consulting's competitive position by providing competitors with insight into the manner in which Deloitte Consulting assembles individuals with particular types of education, experience and talents into project teams. In addition, disclosure of such information would allow Deloitte Consulting's competitors with visibility into how we may position subcontracts for the potential engagement, and there is no public interest in the identity and qualifications of proposed subcontractors and teaming partners submitted in a proposal unless such information becomes part of a subsequent contract. Deloitte Consulting's competitors could use this Protected Information to free ride on its years of experience by assembling project teams virtually identical to those of Deloitte Consulting in terms of composition and qualifications. Deloitte Consulting's success as a professional services provider depends on the talent and skills of its professionals. Therefore, Deloitte Consulting has spent considerable resources recruiting, hiring, training, and retaining the employees whose names and qualifications are included in the Deloitte Proposal. Providing competitors with the identification of our firm's resources not only would result in placing Deloitte Consulting in a less competitive position in the future, but could also compromise our ability to perform in the present, should those resources be pirated by competitor.

Because Deloitte Consulting considers its staffing strategy and proposed team to be trade secrets, Deloitte Consulting does not customarily release its staffing arrangements to third parties and detailed staffing information is not publicly available on Deloitte's website or in marketing materials. The *specific* collection of Deloitte Consulting's proposed personnel and subcontractors submitted in the Deloitte Proposal along with their unique education, experience, and qualifications cannot be readily ascertained or derived from publicly available information. If the names and resumes for these professionals were released, they would be an ideal tool for competitors to use in poaching Deloitte Consulting's employees in this area. This would cause substantial harm to Deloitte Consulting via the loss of these skilled employees, and it would provide a resultant benefit to Deloitte Consulting's competitors, who could acquire the benefit of these employees without having to make substantial investments in their training and development.

Further, in order to protect the confidentiality of certain information, not all team members are provided access to all sections of Deloitte Consulting's proposals. To the extent Deloitte Consulting must disclose such information to its prospective clients as part of a bid proposal, Deloitte Consulting either requires a confidentiality agreement or endeavors to protect the confidentiality of the information to the fullest extent possible under the applicable open records laws. It would take a competitor a significant amount of time and effort to assemble this collection of information and therefore it should be protected from public disclosure as Deloitte Consulting's proprietary and trade secret information.

Deloitte Consulting is not aware of any public interest in the disclosure of this information. Certainly, Deloitte Consulting's personnel, including its proposed subcontractors, have a reasonable belief that the compilation of their names, photos, signatures, relevant project experience, references, contact information, and other qualifications would not be disclosed pursuant to the Arizona Inspection of Public Records Act and are entitled to protection of their privacy. Because the compilation of such information provides Deloitte Consulting with a competitive business advantage in winning solicitations, is not relevant to the ordinary work of AHCCCS, and the protection of this private information outweighs the public interest in disclosure, we request that such information be withheld from public disclosure pursuant as Deloitte Consulting's trade secret and proprietary commercial information. *See Prof'l Review Org. of Fla., Inc. v. Dep't of Health and Human Servs.*, 607 F. Supp. 423, 425 (D.D.C. 1985) (information regarding contractor's organizational structure and staffing was exempt from disclosure under the FOIA); *Audio Technical Services LTD. v. Department of the Army*, 487 F. Supp. 779, 782 (D.D.C. 1979) (same for "biographical data on key . . . employees").

Based upon this Section, the provisions of the Deloitte Proposal as listed in the Submittal Letter and as further set forth in the redacted copy provided should be withheld from disclosure by AHCCCS.

3. Past and Present Clients/Customers, Reference Information, and Experience.

The Deloitte Proposal contains confidential information pertaining to Deloitte Consulting's capabilities and non-public client qualifications which include client organization, client names, and details about the work performed for those

clients. The identities of Deloitte Consulting's clients and the information about the projects completed for those clients, including key contact information are protected, proprietary commercial information and trade secrets. The release of the past performance material in the various documents would cause substantial competitive harm to Deloitte Consulting, and is also, therefore, exempt from disclosure. Past performance information necessarily discloses the identity of a contractor's clients/customers, both in the private and public sectors. Information relating to a company's customers is exempt from disclosure, because "disclosure of this type of information would threaten the competitive position of the submitter." *Audio Technical Services LTD. v. Department of the Army*, 487 F. Supp. 779 at 782 (D.D.C.

1979); see also *Fund for Constitutional Government v. Federal Trade Commission*, No. CA 79-0250, 1981 WL 2117, at *2 (D.D.C., July 10, 1981) (identity of customers and information concerning contracts with customers exempt under Exemption 4). Further, this information contains technical details and methodologies employed by Deloitte Consulting in performing other contracts for the design, development, implementation, and maintenance and operations of modernized integrated eligibility systems relevant to AHCCCS' project, and, as discussed above, such information is exempt from disclosure. The Court of Appeals of Arizona found in [Calisi v. Unified Fin. Servs., LLC](#), 232 Ariz. 103, 106, 302 P.3d 628, 631 (Ariz. App. 2013) that "a customer list may be entitled to trade secret protection when it represents a selective accumulation of detailed, valuable information about customers — such as their particular needs, preferences, or characteristics — that naturally 'would not occur to persons in the trade or business.'"

The client information in the Deloitte Proposal contains a trove of valuable information. The clients' identities themselves are valuable, trade secret data. Additionally, the client key contact information, descriptions of the work performed for Deloitte Consulting's clients, and other nonpublic engagement details constitute trade secret data. The client list in these materials is not simply information related to a single or ephemeral event in the conduct of Deloitte Consulting's business. Many of these clients are repeat customers of Deloitte Consulting's services, and Deloitte Consulting seeks to engage these customers for more business opportunities in the future. Deloitte Consulting is actively working on ongoing business for some of these clients. Likewise, the descriptions of the work performed for these clients is not simply information about single, completed projects. Deloitte Consulting often applies similar methodologies in projects for the same client or for different clients. The descriptions (coupled with the client identities and key contact information) are a crucial part of Deloitte Consulting's business formula. Deloitte Consulting is seeking to protect traditional trade secret information: the compilation of its unique qualifications and project references, including client identities and key contact information, descriptions of work processes and project scope, and other contract information that may be used over and over again in Deloitte Consulting's business of delivering quality services. See [Morlife, Inc. v. Perry](#), 56 Cal. App. 4th 1514 at *1522 (Cal. App. 1997) (customer list has economic value because disclosure would allow a competitor to direct its sales efforts to those customers who have already shown a willingness to use a unique type of service or product); see also [MAI Sys. Corp. v. Peak Computer, Inc.](#), 991 F.2d 511 at *521 (9th Cir. 1993).

Deloitte Consulting has expended a substantial amount of time, effort, and money to develop its relationships with the clients revealed in the Deloitte Proposal submitted to AHCCCS. In addition, Deloitte Consulting performed specialized work for such clients and spent time developing processes to solve their special needs. Deloitte Consulting's competitors could use such information to undermine Deloitte Consulting's future efforts to develop business with new clients as well as maintain business relationships with their past clients. For example, if the client information was obtained by Deloitte Consulting's competitors, then the competitors could make targeted "pitches" that highlight the competitors differences with Deloitte Consulting to those businesses and government agencies. See *Calisi*, 232 Ariz. at 107 (a customer list may be entitled to trade secret protection where the claimant demonstrates it compiled the list by expending substantial efforts to identify and cultivate its customer base such that it would be difficult for a competitor to acquire or duplicate the same information).

There are many other ways in which Deloitte Consulting's competitors could make use of the valuable client and project information. For example, Deloitte Consulting's competitors could use the client identities and contact information to attempt to obtain negative reviews of Deloitte Consulting's work for those clients; such negative reviews could then be used against Deloitte Consulting when the competitors submit proposals in competition with Deloitte Consulting on

future private and public projects.

Additionally, the *specific* compilation of client names, project descriptions, and lessons learned constitute Deloitte Consulting's demonstrated competence and qualifications to perform the services requested by AHCCCS. This information is not widely known outside of Deloitte Consulting. These clients are not identified in documents that are disseminated widely nor are they made known on Deloitte Consulting's internet website. Further, these clients and the details about the work performed for them are not known by all Deloitte Consulting employees or others involved in Deloitte Consulting's business. Therefore, this collection of information as a whole would take Deloitte Consulting's competitors significant time and effort to collect and disclosure of this information would certainly provide competitors with valuable insight on how to structure their qualifications for future bids. See [Tribal Behav. Health LLC, 2022 U.S. Dist. LEXIS 112186 at 34-35](#) (a customer list may qualify for trade secret protection if it provides a competitive advantage over others in the industry because it provides other information—such as the unique needs or points of contact for each customer that can be difficult to obtain).

Without access to the client information contained in the Deloitte Proposal, including details regarding the specialized solutions and approaches, Deloitte Consulting's competitors would be unable to "properly acquire" that information. Deloitte Consulting does not customarily release this Protected Information to competitors or otherwise to the public. Therefore, because the release of such client information would give Deloitte Consulting's competitors an advantage, such information is protected from disclosure pursuant as a trade secret and/or proprietary commercial information. See [Calisi, 232 Ariz. at 107](#) ("a customer list may also be entitled to trade secret protection if the claimant demonstrates it compiled the list by expending substantial efforts to identify and cultivate its customer base such that it would be difficult for a competitor to acquire or duplicate the same information."); see also *Courtesy Temporary Service, Inc. v. Camacho*, 222 Cal. App. 3d 1278 at *1287 (Cal Ct. App. 1990.) (a customer list procured by substantial time, effort, and expense is a protectable trade secret . . . it is this very "work effort" or process of acquiring and retaining clientele, that constitutes a protectable trade secret).

Based upon this Section, the provisions of the Deloitte Proposal as listed in the Submittal Letter and as further set forth in the redacted copy provided should be withheld from disclosure by AHCCCS.

4. Other Proprietary Commercial Information.

The Deloitte Proposal contains information regarding Deloitte Consulting's breadth of capabilities and competencies relevant to the requested services, including project highlights, distinguishing factors regarding Deloitte Consulting's Government and Public Services (GPS) practice, its marketplace relationships and alliance partners, client testimonials, individual case studies, and its proposed project assumptions. Such information constitutes Deloitte Consulting's internal, confidential and proprietary commercial and financial information. This information is not publicly reported and is not publicly disclosed. Deloitte Consulting provided this information so that AHCCCS could evaluate its responsibility and its ability to perform the work required but with the expectations that it would not be publicly disclosed. Because this information is not publicly disclosed, Deloitte Consulting would be disadvantaged if its competitors were made aware of this information.

The Deloitte Proposal also includes Deloitte Consulting's proposed changes and exceptions to the terms and conditions contained in the Task Order and as such, constitute Deloitte Consulting's confidential commercial information and risk position. If this information were disclosed it would substantially harm Deloitte Consulting's competitive position as its competitors, by knowing the tolerance for certain terms and conditions to which Deloitte Consulting will agree and its preferred language, could unfairly exploit that knowledge by undermining and "under-bidding" Deloitte Consulting in future solicitations across the country. Hence, disclosure of this Protected Information would impair Deloitte Consulting's ability to successfully compete for future work by relinquishing our approach to our competitors who may then fashion future proposals to utilize a similar strategy with regard to risk tolerance and preferred terms language.

Furthermore, this information is not released to the public and is closely protected within Deloitte Consulting. Because this information is not publicly disclosed, Deloitte Consulting would be disadvantaged if its competitors were made aware of this information.

The Deloitte Proposal contains Deloitte Consulting's confidential and proprietary commercial information regarding its ability to meet AHCCCS' subcontracting requirements, including the identities and contact information of its proposed subcontractors. Such information constitutes Deloitte Consulting's internal, confidential commercial and proprietary information. This information is not publicly reported and is not publicly disclosed. Deloitte Consulting provided this information so that AHCCCS could evaluate its responsibility, its ability to perform the work required, and its inclusion and supplier engagement practices and program initiatives. Because this information is not publicly disclosed, Deloitte Consulting would be disadvantaged if its competitors were made aware of this information.

Based upon this Section, the provisions of the Deloitte Proposal as listed in the Submittal Letter and as further set forth in the redacted copy provided should be withheld from disclosure by AHCCCS.

5. Summary

For the reasons stated above, Deloitte Consulting objects to the disclosure of the redacted portions of the Deloitte Proposal concerning its proprietary methodologies, tools, assets, solutions, and technical approach; the identities and qualifications of its personnel and proposed subcontractors; its customers and client reference information; and other proprietary commercial information. Release of Deloitte Consulting's Protected Information would impair Deloitte Consulting's competitive position, undermine the integrity of the procurement process and may discourage Deloitte Consulting and other qualified firms from submitting proposals in the future.

Thank you for your consideration of this matter. In the event that AHCCCS disagrees with the information that Deloitte Consulting has identified as confidential and exempt from public disclosure, please contact me in advance of the release of any Deloitte Consulting-related information identified herein so that we can discuss the matter.

Sincerely,



Josh Nisbet, Principal
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PART C

C2 Exceptions



C2. Exceptions to Any Part of the Task Order

C2. Exceptions to Any Part of the Task Order

Exceptions: All exceptions included with the Offer shall be submitted in a clearly identified separate section of the Offer in which the Offeror clearly identifies the specific paragraphs of the Solicitation where the exceptions occur. Any exceptions not included in such a section shall be without force and effect in any resulting Contract unless such exception is specifically accepted by the Procurement Officer in a written statement. The Offeror's preprinted or standard terms will not be considered by the State as a part of any resulting Contract. All terms and conditions of the State Contract shall apply to this solicitation and exceptions to the terms contained in the State contract will not be allowable for this task order. All exceptions that are contained in the Offer may negatively impact an Offeror's susceptibility for award. An Offer that takes exception to any material requirement of the solicitation may be rejected.

Deloitte Consulting LLP ("Deloitte Consulting") is pleased to submit this proposal to the Arizona Health Care Cost Containment System ("AHCCCS"), in response to its Request for Proposals, due January 8, 2026 (the "Task Order") to implement an AI Call Center Integration ("Services"). We believe, however, that certain of the provisions included in the Task Order (the "Proposed Terms") should be modified or clarified for this engagement.

Our experience has indicated that almost without exception we have been able to reach agreement with each of our public sector clients that has awarded us an engagement. In most of these cases, we have had some concerns over the proposed terms and conditions included in the procurement request. Our working relationship with AHCCCS has proven that AHCCCS and Deloitte Consulting have been successful in expeditiously working together through important engagement requirements and provisions (i.e., indemnification, limitation of liability, intellectual property). Thus, if we are selected for award, please trust that Deloitte Consulting is open and ready to promptly negotiate mutually agreeable terms in a collaborative and expeditious manner – similar to how the parties have successfully negotiated the Statewide Data Management Services Contract ("Master Contract").

Nevertheless, per the instructions in Attachment 5, Section 15, we have identified certain provisions to which we are requesting an exception. Our proposal is submitted with the understanding that Deloitte Consulting and AHCCCS subsequently reach and enter into a mutually agreeable task order for the proposed services. We look forward to working with AHCCCS on this opportunity and will negotiate expeditiously, if awarded.

Terms and Conditions

Section 1. We wish to clarify that any termination due to impacted funding be a termination for convenience.

Section 2. We would like to discuss further with AHCCCS an appropriate time period during which the Contractor must continue working pending the final resolution of any disputes involving the Contract.

Section 3. We requests that the protection of each party's confidential information be made a mutual obligation and the details of each party's responsibilities to protect confidential information be clarified to allow for standard exclusions, including: (i) as expressly set forth in the applicable SOW; (ii) to contractors providing administrative, infrastructure and other support services to the receiving party and subcontractors providing services in connection with an SOW, in each case, whether located within or outside of the United States, provided that they have agreed to be bound by confidentiality obligations similar to those in this sub-Section; (iii) as may be required by law or regulation, or to respond to governmental inquiries, or in accordance with applicable professional standards or rules, or in connection with litigation pertaining to this Agreement or an SOW; or (iv) to the extent such information (A) is or becomes publicly available other than as the result of a disclosure in breach hereof, (B) becomes available to the receiving party on a nonconfidential basis from a source that the receiving party believes is not prohibited from disclosing such information to the receiving party, (C) is already known by the receiving party without any obligation of confidentiality with respect thereto, or (D) is developed by the receiving party independently of any disclosures made to the receiving party hereunder.

Section 5. The Master Contract has an intellectual property provision (Section 3.9 of the Universal

Terms and Conditions), which contradicts, in some parts, Section 5. We would like to discuss to get a clearer understanding of which provision applies.

Section 6 Records. Similarly, Section 3.6 of the Special Terms and Conditions in the Master Contract set forth requirements around records and audit rights; would AHCCCS consider striking Section 6 since the subject matter is addressed in 3.6?

HIPAA Business Associate Addendum: we request clarifying edits to the BAA, similar to other BAAs we have in place with the State. For example, we would like to discuss alternative remedies in lieu of the indemnification for claims related to Contractor acts or omissions in connection with its obligations under the BAA.

Assumptions:

1. AHCCCS will provide qualified and knowledgeable resources to the project team with business and technical skills required for the project to be delivered within the mutually agreeable timeline.
2. AHCCCS executive management will provide full sponsorship and support for this project, including approval of budget, resources, and timing.
3. AHCCCS will not withhold or delay access to the AHCCCS leadership, managers, employees, information, and systems/data that are required to deliver the scope of work.
4. Third party products will work as specified by the third party application vendor. Any significant issues with the functionality/quality of the software could affect Deloitte Consulting's estimate, timeline, and resources.
5. AHCCCS will reach timely agreement with the vendors to allow for the timely provision of the products identified in the Response and Deloitte Consulting will have all access and use rights as required to perform the services.
6. Deloitte Consulting will have no responsibility for the performance of any third party software or hardware.
7. Deloitte will not provide legal advice regarding our services nor will we provide assurance regarding the outcome of future audits or regulatory examination or other regulatory action. The responsibility for legal issues with respect to these matters, such as reviewing deliverables and work product for legal implications, regulatory compliance, or anything related, will be AHCCCS's responsibility.
8. In the event of any delays caused outside of Deloitte Consulting's direct control, a change or deviation in scope, any failure of any stated assumptions, or AHCCCS (or its vendors) fail(s) to meet its obligations, Deloitte Consulting's ability to perform as set forth herein may be adversely impacted and an equitable adjustment to scope, cost and schedule will be agreed to by the parties in a change order to account for the impact.
9. AHCCCS will limit sensitive information, such as PII, PHI, trade secrets and other information that it considers sensitive or highly confidential, it provides to Deloitte Consulting (or otherwise makes available to Deloitte Consulting) to only that which is reasonably necessary to allow Deloitte Consulting to provide the Services. Any disclosure of sensitive information by AHCCCS to Deloitte Consulting will utilize levels of information security and data encryption appropriate to maintain security of AHCCCS sensitive information being accessed by or transferred to Deloitte Consulting, and as required by applicable information protection laws.
10. When providing services, Deloitte may utilize tools and applications available in the market, such as RPA, AI, cloud, cyber, immersive, and other similar tools and applications as available. These tools and applications may be utilized for their innovation, efficiency, and ability to enhance our solutions.

11. In connection with the Services, Deloitte Consulting will leverage generative AI that is included within the Genesys and ServiceNow platforms owned or licensed by AHCCCS in the creation of certain Deliverables that result in content that is created by generative AI (“GenAI Work Product”).
12. AHCCCS acknowledges that content created by generative AI may not be protectable under copyright or other intellectual property laws. In addition, due to the nature of generative AI technologies, the provisions of the Agreement regarding infringement of intellectual property shall not apply to GenAI Work Product. However, Deloitte Consulting will pass on to AHCCCS the benefit of any intellectual property infringement indemnification it may receive from the generative AI vendor with respect to infringement claims against AHCCCS regarding any GenAI Work Product.