



Department of Developmental Services

**REQUEST FOR INFORMATION (RFI)
RFI_T6655 Addendum #1**

For

**Consumer Electronic Records Management System (CERMS),
Uniform Fiscal System Modernization (UFSM), and
Federal Reimbursement and Revenue Recovery (FRRR)**

October 29, 2024

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1. INTRODUCTION AND OVERVIEW

The State of California Department of Developmental Services (DDS) invites companies that responded to Request for Information (RFI) T6655 to review and respond to RFI T6655 Addendum 1 (T6655-A1). To assist in your review and response, the original submission has been included in this package.

RFI T6655, released on May 10, 2023, requested information regarding the department's modernization plans for the case management and financial management business operations, referred to in the RFI as the Consumer Electronic Records Management System (CERMS) project and the Uniform Fiscal System Modernization (UFSM) project. The original RFI requested recommendations on whether or not DDS should keep the project separate or combine efforts. The DDS determined it would be best to combine efforts. The new project name will be referred to as the Developmental Services Modernization Project (DSMP).

2. PURPOSE OF THIS REQUEST FOR INFORMATION (RFI)

DDS issues this Request for Information (RFI) to solicit additional information and best practices from the vendor community to assist the State in determining what is currently available in the marketplace based on the objectives and requirements as described herein.

The intent of this RFI is not to select a proposed solution or vendor. RFI T6655-A1 is for information-gathering and market research purposes to assist in understanding products or services and estimated costs to address the department's business requirements.

DDS is seeking updates to the respondents' original RFI T6655 response that address the following:

1. Inclusion of Federal Reimbursement, Revenue Recovery requirements and new data exchange interfaces
2. Additional detail and user counts for service desk support
3. Updates related to respondent's use of artificial intelligence for the project as well as inclusion in the solution

Interested parties are invited to describe products and/or suggested approaches to implementing a Commercial-Off-The-Shelf (COTS) or Modified-Off-The-Shelf (MOTS) solution to address the required functions described in this RFI. Multiple products may be described in the response.

3. KEY ACTION DATES

The following are the Key Action Dates and Times regarding this RFI.

Action	Date/Time
Release of RFI Addendum #1	10/29/2024
Market Research Conference RSVP Due	11/05/2024 3:00 p.m.
Market Research Conference	11/08/2024
Last day to submit questions	11/14/2024 by 4:00 p.m. (PST)
State's response to questions	11/21/2024
RFI Responses Due	12/06/2024 by 4:00 p.m. (PST)

4. DISCLAIMER

1. This RFI is issued to obtain vendor and solution information to assist DDS in understanding the current market and for project planning activities.
2. This RFI does not constitute a solicitation. A response to this RFI is not an offer and cannot be accepted by the State to form a binding contract.
3. Respondents are solely responsible for all expenses associated with responding to this RFI.
4. Responding to this RFI creates no obligation on the part of any respondent to DDS. Conversely, issuing this RFI and considering the responses creates no obligation on the part of DDS to any respondent.
5. Submitting a response to this RFI will not enhance the review of that respondent's proposal(s) to any future solicitations. Not submitting a response to this RFI will not prohibit a response to any future solicitations, nor disadvantage the evaluation of a response to any future solicitation. By submitting a response to this RFI a respondent is implicitly agreeing with these conditions.
6. DDS asks willing respondents to share non-binding budgetary pricing information. Pricing is only for planning purposes. Any pricing provided in a response to this RFI will not be considered a proposal/bid on the part of the respondent.
7. Responses to the RFI will not be returned.
8. The right to compete in future procurements is not affected in the event that the party chooses not to submit a response to this RFI. DDS is also interested in learning the reasons for not submitting a response.

5. RFI FORMAT AND SUBMISSION

Responses to this RFI are due by the date and time stated in the Key Action Dates and Times section.

Responses must be submitted **via email** to the DDS contact listed in the Contact Information section.

The respondent shall provide the following:

- On the subject line of the email, include: **DDS RFI T6655 Addendum #1**
- Respondent name, contact person, telephone number, and email address, as part of the sender's contact information
- Attachment 1_RFI Response Worksheet

The State reserves the right and has sole discretion to contact respondents directly to seek clarification of any response received.

6. RESPONDENT QUESTIONS

All questions related to this RFI must be submitted via email by the date specified in the Key Action Dates section and to the contact person listed in the Contact Information section.

The following should be included in the email inquiry:

- On the subject line of the email, include: **DDS RFI T6655 Addendum #1**
- Respondent name, contact person, telephone number, and email address, as part of the sender's contact information
- RFI section, attachment name, exhibit name, page number, and/or other information useful in identifying the specific problem or issue in question
- The respondent's question(s)

The State reserves the right and has sole discretion to contact respondents directly to seek clarification of any inquiry received. The State may respond to questions directly to the respondent or if deemed necessary, release an additional addendum or updated RFI.

To ensure a timely response, questions are to be sent no later than the date provided in the Key Action Dates section. Questions and answers will be made available to all respondents. The parties submitting questions will not be publicized in the T6655-A1 Question and Answer document.

7. CONTACT INFORMATION

The RFI responses and all correspondence and/or questions related to this RFI shall be directed to the State contact person identified below:

Name: Dana Perez

Office: Department of Developmental Services

Phone: (916) 653-7218

Email Address: dsmp@dds.ca.gov

8. MARKET SURVEY CONFERENCE

The DDS will conduct a Market Survey Conference to discuss the DDS effort to replace a legacy case management system, legacy financial management system, and federal reimbursement and revenue recovery system through the Developmental Services Modernization Project (DSMP) project.

All respondents are encouraged to attend through web conferencing that will be made available. The time and date are specified in the Key Action Dates. The web conference information will be provided within one (1) day after receipt of the respondent's RSVP to the conference. Bidders must RSVP via email to the above contact no later than November 5, 2024, 3:00 p.m. PT.

Questions may be answered at the conference; however oral responses shall not be binding on the State. A transcript of the Market Survey Conference will not be created.

ATTACHMENTS AND EXHIBITS

Respondents must complete and return the Attachment 1_RFI Response Worksheet.

The exhibits below include additional detail for the Federal Reimbursement and Revenue Recovery scope and the respondent's original response to the RFI T6655.

- Exhibit 1_Federal Reimbursement and Revenue Recovery Program containing federal reimbursement and revenue recovery mid-level requirements, workflows, and new data exchange interface.
- Respondent's response to the RFI T6655. Each vendor will be provided their original submittal as a reference for completing this RFI T6655 Amendment #1, Attachment 1_RFI Response Worksheet.
- RFI T6655 zip file containing CERMS and UFSM specifications for vendor reference. Please note that there have been no changes to the following:
 - Exhibit 1_CERMS and UFMS Overview provides an overview of the DDS and Regional Center (RC) case management and financial management business processes and systems.
 - Exhibit 2_CERMS Specifications provides an overview of future or to-be case management business processes and a business capability model that maps business functions and processes to the requirements. This Exhibit also includes current or as-is case management business process workflows and narratives.
 - Exhibit 3_UFSM Specifications provides an overview of future or to-be financial management business processes and a business capability model that maps business functions and processes to the requirements. This Exhibit also includes current or as-is financial management business process workflows and narratives.