



RFQ QUESTIONS/INQUIRIES AND ANSWERS MEMORANDUM

DATE: July 19, 2023

PLEASE ADDRESS INQUIRIES TO:

Ron Wachenheim

Contract Management Specialist 2

E-Mail: rfp@dfs.ny.gov

RFQ NO.: C000567

TITLE: CRM Design, Setup and Implementation

BID DUE DATE: July 31, 2023 by 3:00 PM

CONTRACT TERM: One (1) year

SUBJECT: Responses to Questions/Inquiries and Additional Information

ALL PROSPECTIVE BIDDERS

Below are the answers to the submitted questions:

QUESTION #1: Do you have any requirements for the implementation team to be on-site?

ANSWER: On-site only for initial kickoff (if possible); otherwise, project can be done remotely but only within Continental United States (CONUS).

QUESTION #2: Can workers on this project be located remotely in Canada or other parts of the world?

ANSWER: No.

QUESTION #3: How does the state create these licenses today?

ANSWER: New process.

QUESTION #4: Will the NYS Pharmacy require data conversion/migration? If yes, please confirm:

- a) The total number of source data systems.
- b) The types of source data systems (e.g., SQL, Oracle, etc.)
- c) The number of tables and attributes per data source.
- d) What is the cleanliness of data on a scale of 1 to 10, with 10 being the cleanest?

ANSWER: No, there may be some manual migration done by DFS once system is available.

QUESTION #5: Do you have any integration with other solutions? If yes, please provide: **Yes - none exist as of now**

a) The number of systems you are anticipating this solution to integrate with: **2-3 (SSO w/SAML or OIDC, PaymentGateway and possibly DropBox or similar)**

b) What is data cleanliness on a scale of 1 to 10, with 10 being the cleanest?: **Not applicable**

ANSWER: See above as answered in bold following each part of the question.

QUESTION #6: What is the approved budget for the new solution?

ANSWER: TBD

QUESTION #7: Do you have an anticipated project timeline and/or go-live date?

ANSWER: PBM licenses must be live by January 1, 2024

QUESTION #8: Do you have a tentative project start date?

ANSWER: ASAP

QUESTION #9: Are there any scheduling constraints for your SME?

ANSWER: No.

QUESTION #10: Does the payment need to be entered into any accounting application?

ANSWER: No.

QUESTION #11: Pg 24 How many fields/inputs are there on the application? Are there any attachments that need to be captured?

ANSWER: See supporting documentation provided with solicitation (field specs)

QUESTION #12: Pg.25 There's a box here labeled "Is the section complete properly?" which basically kicked into a yes/no loop

a. How many sections are there? (Approvals will have to be tied to each section, so the number of sections affects effort)

ANSWER: TBD

b. Is it serial or parallel? (linear or not?) Can section 3 be completed without section 1 being correct?

ANSWER: Can be completed in parallel but not submitted until all areas complete.

c. Do you know if approvals are required at each section, or is it all or nothing? (e.g.so, review → 1. approve 1 → review 2. → approve 2 OR review 1 → review 2 → approve ALL)

ANSWER: All or nothing.

d. Can an application be partially approved? (Either at the first approval level or the second?)

ANSWER: No.

QUESTION #13: Is a rejected application available for the initial submitter to edit, or do they have to start a new application?

ANSWER: Yes, it goes back for edit/correction.

QUESTION #14: Are payments refunded if an application is rejected? (Payment is taken when the application is submitted according to the flow)

ANSWER: No refunds.

QUESTION #15: Could you tell me how notifications are sent? (Email only? SMS? Etc.)

ANSWER: E-mail.

QUESTION #16: On page 8 of the RFP there, it states the following: For purposes of this solicitation, the Department hereby establishes an overall goal of 100% for MWBE participation, 100% for New York State-certified minority-owned business enterprise (“MBE”) participation and/or 100% for New York State-certified women-owned business enterprise (“WBE”) participation (collectively, “MWBE Contract Goals”) based on the current availability of MBEs and WBEs. Does this mean that if you are not a “MBE” or MWBE” you can’t win the award for this opportunity? or are these just goals?

ANSWER: It means only certified MWBE companies can submit proposals for RFQ #C000566.

QUESTION #17: Is data migration required? If yes, what is the size of the data. Nos of records / number of tables

ANSWER: See Answer to Question #4.

QUESTION #18: Will there be a need to migrate documents/images/attachments?

ANSWER: No.

QUESTION #19: What is the budget allocated to this project?

ANSWER: See Answer to Question #6.

QUESTION #20: The understanding is there will be a Discovery Phase. If yes, what is the expected duration of the Discovery Phase?

ANSWER: Not to exceed 20 business days.

QUESTION #21: Is the Vendor required to be onsite during the Discovery Phase, or can this be done remotely via Teams?

ANSWER: See Answer to Question #1.

QUESTION #22: Can the configuration of the environment and the solution be done remotely?

ANSWER: See Answer to Question #1.

QUESTION #23: Approximately how many Internal and External users will be using the solution?

ANSWER: Internal: 100; External: 500.

QUESTION #24: Does the Vendor require to be onsite for the duration of the configuration or can the configuration be done remotely?

ANSWER: See Answer to Question #1.

QUESTION #25: Is the Department willing to leverage any existing functionality the Vendor may have that may meet or exceed the Department's requirements and build on top of it?

ANSWER: Yes.

QUESTION #26: Two RFP was floated, RFQ C000566 and RFQ C00567. Are both of the RFP the same?

ANSWER: Yes they are the same. Only difference is RFQ #C000566 is only open to certified MWBE companies, and RFQ #C000567 is only open to certified SDVOB's. Only one award will be made on one of these RFQ's, not both.

QUESTION #27: If the vendor chooses to partner, will the experience of any partner suffice the requirement relating to reference?

ANSWER: References should not include any partners, only from companies for who the bidder has completed work.

QUESTION #28: Are there any required integrations beyond the named payment platform? If yes, please provide details.

ANSWER: See Answer to Question #5.

QUESTION #29: Please provide payment platform and processing vendor details

ANSWER: TBD (Elavon, WorldPay or FirstData from NYS OGS contract)

QUESTION #30: How many use cases for payments transactions does the Agency anticipate having? What is the anticipated volume of payment transactions by day/week/month?

ANSWER: Use case – 1; and anticipated volume - upwards of 100 per month.

QUESTION #31: Does the Agency have an existing application to calculate payment fees, is it on-line and can you provide the logic?

ANSWER: Static lump sum defined in legislation.

QUESTION #32: What is the Agency's identity management system, Single Sign On system, and process for external user logins?

ANSWER: TBD – Will use SAML or OIDC.

QUESTION #33: Is there data to migrate into the new solution? If yes, can the Agency please provide the details - # of source systems, volume of data and tables from each source etc.

ANSWER: See Answer to Question #4.

QUESTION #34: How many applications does the Agency anticipate processing per year?

ANSWER: See Answer to Question #30.

QUESTION #35: How many internal users does the Agency have (PBB staff)?

ANSWER: See Answer to Question #23.

QUESTION #36: Will this system integrate with an e-signature application, such as DocuSign, OneSpan or Acrobat Sign? If so, what is the preferred e-signature platform?

ANSWER: No.

QUESTION #37: How many business rules are associated with the 1st and 2nd Reviews? (Exhibit #1)

ANSWER: See supporting documentation provided with solicitation.

QUESTION #38: Regarding section 19 Warranties of the Contract, can the Vendor assume that the services requested under this RFQ will be subject to the 90 day Workmanship warranty and not the 1 year Product warranty?

ANSWER: Correct – 90 day workmanship warranty applies here.

QUESTION #39: Does the scope include protected data that cannot be accessed by off-shore resources?

ANSWER: Yes.

QUESTION #40: Are all vendor resources required to be on-shore?

ANSWER: See Answer to Question #22.

QUESTION #41: Are there multiple application/license types that the user can apply for? If yes, would there be separate templates to send notifications for different application/license types?

ANSWER: No.

QUESTION #42: Which third-party systems are needed to integrate with Salesforce?

ANSWER: See Answer to Question #5.

QUESTION #43: Which payment gateway(s) is DFS currently using or considering for integration with Salesforce?

ANSWER: See Answer to Question #29.

QUESTION #44: What action(s) is expected once a license is granted? Will it be a simple notification on the user's account on the portal or any other?

ANSWER: Communication via email, portal and printable license generated in entity profile.

QUESTION #45: Is data migration part of scope? If yes, please specify the volume of data.

ANSWER: See Answer to Question #4.

QUESTION #46: Our company is a NY MBE Firm and not a SDVOB business, would we still qualify to apply for the bid?

ANSWER: Yes, you can submit a proposal under RFQ #C000566.

QUESTION #47: Also does the state already have the necessary Salesforce Licenses for the solution.

ANSWER: Licenses are being procured separate from this solicitation.

QUESTION #48: If the state is expecting licenses to be a part of the response, can the state provide us with the number of users and workers that will be using the CRM.

ANSWER: See Answer to Question #47.

QUESTION #49: Also what is the Bill of Material on the Salesforce Licenses

ANSWER: See Answer to Question #50.

QUESTION #50: Which Salesforce products will DFS be licensing to support this project?

ANSWER: a) Public sector foundation gov cloud; b) community plus for public sector; and c) Salesforce Shield.

QUESTION #51: Will DFS require any Change Management or Training services?

ANSWER: No.

QUESTION #52: Does DFS have access to a certified Salesforce Administrator and/or other skilled Salesforce resources to support this solution post-delivery?

ANSWER: No.

QUESTION #53: How were the process diagrams for PBM License Process, DFS Review, PBM Profiles and the User Stories developed? Are these considered final, or will there be an opportunity to complete additional assessment and confirm scope?

ANSWER: Business interviews with business owner, will be assessed and potentially modified during discovery phase.

QUESTION #54: The RFP specifies Design, Setup, and Configuration, but does not mention Discovery. Will the selected contractor have an opportunity to complete additional requirements gathering and user story definition?

ANSWER: See Answer to Question #20.

QUESTION #55: Can you outline the resources from DFS and any aligned departments/organizations who will be participating in this project along with their expected level of engagement?

ANSWER: a) DFS PBB business unit; b) DFS IT/PMO; c) DFS ISO; and d) DFS Insurance business unit

QUESTION #56: Does DFS have a PMO and defined project management approach?

ANSWER: Yes.

QUESTION #57: Does DFS require any specific delivery methodology (e.g., Agile) for the execution of this project?

ANSWER: No.

QUESTION #58: The user stories mention a public portal. Does that currently exist or will that be delivered as part of this project?

ANSWER: Does not exist, deliverable.

QUESTION #59: Is there a possibility for an extension for this RFQ?

ANSWER: Not at this time.

All other terms and conditions of the bid solicitation remain the same.

This Memorandum is to be signed, submitted and made a part of your quote/proposal.

VENDOR: _____

ADDRESS: _____

SIGNATURE OF BIDDER: _____

DATE: _____