

ADDENDUM #01

RFP – DATA AND APPLICATION SYSTEM FOR SUMMER EBT

Questions Submitted from Interested Parties:

1. General Information

• Vendor Verification

- Do we have to be a registered vendor with the Cherokee Nation to respond to the RFP?
 - If so, what is that process and how do we become a registered vendor to be considered to apply for this RFP?

The Nation will be accepting sealed proposals from Indian and Non-Indian parties. New vendor set up will be processed, as needed, after award.

• Other Licenses and Registration Requirements

- What are the required credentials that the nation needs?

All contractors are required to hold any and all necessary applicable professional licenses and registrations required by law. Proof of professional licenses is required with the proposal. Obtaining and ensuring compliance to all licensing and registering requirements is the complete responsibility of the contractor.

- What licensing information do we need to supply with the response?

See previous response.

• Formatting and Submission

- Is there a formal template for how this information should be delivered?

Please see the 'Review of Proposals' section of posted RFP for details.

- Is there any additional information we should be aware besides the original PDF supplied by the Cherokee Nation Procurement Page, advertising the RFP.
 - As in, are there additional questionnaires that we have to fill out?

Additional paperwork will be required if awarded the proposal.

- If responses are to be mailed in or hand delivered by Feb 28th, 2025, 3 PM CT.
 - Are responses mailed in before the deadline date but arrived after still in consideration?

Sealed proposals **must be received** by Cherokee Nation Purchasing Department, Johnna Riggs, no later than February 28, 2025 by 3:00 pm CT to be eligible for award. Proposals received after this deadline will not be accepted and will not be considered for award.

- **Budget and Pricing**

- Is there an identified budget for this project?
 - If so, what's is budget?

Not at this time.

- Is this expected to be priced for Fixed Bid or Time and Materials?

Fixed Bid.

- Is there a preference for how pricing information should be supplied?

Detailed pricing information should be provided.

- **Timelines**

- What is the expected "Go Live" date for a solution to be in production environment?

TBD

- What is the expected date for staff to be trained on the solution?

TBD

- **Users**

- What is the total expected number of staff to be using the system, as in, how many users can we expect?

40

- What is the peak number of staff that would be expected to be using the system at a single given time? (Out of all your users, how many would be logged on and actively using the system at a given time.)

15-20

- What is the expected amount of community stakeholders to be accessing the solution through the portal?

3

- What is the peak number of community stakeholders expected to be using the system at a single given time?

5

- **References**

- Does the nation require any reference or contact information from past works completed?

The Cherokee Nation is seeking proposals from interested parties with qualifications, credentials, and previous experience providing services for organizations similar in size and scope. (examples would be helpful)

- **Project Management**

- If we are awarded the contract. Will we be working with a committee or dedicated project manager to undergo the implementation and configuration of the scope of work?

A committee would be overseeing project.

- **Current Technology/Systems/Processes**

- Do you have a system that does this today and you're just looking for a new system?
 - If yes, what is the reason you want to replace the existing system?

Yes. In the past we have administered the program through use of an application which was not entirely fit-for-purpose and which required running data through disparate software tools to meet the requirements.

- Are these processes handled today strictly through paper?

No

2. Public Health Specific Solutions

- **EBT Provider Interface:** Bi-directional data interface between MIS and EBT Provider's MIS supporting transmission or program data (Card holder, issuance, redemption)
 - What systems is the data expected to be exchanged between?

Data would be exchanged between the MIS solution and an online EBT card provider's system.

- Where do these systems reside?
 - Are they in a Cherokee Nation Cloud Environment, in a government cloud environment, AWS and/or Microsoft Azure environment?

The RFP is for the MIS system – ideally it would be a cloud system. The online EBT card provider system would be a cloud system.

- Do these systems have API's available?
 - If so, can we get access to the documentation for these APIs?

The RFP is for the MIS system – it would need to have the ability to connect to the EBT provider's system that we select.

- Is the EBT Provider a separate vendor that the participant portal would be passing and receiving data from?

Yes – the MIS system we procure would need to have the ability to send and receive data to the vendor (OEBT provider's system).

- When you say bi-directional passing of data between MIS and the EBT vendor MIS, is that referring to passing between this portal solution and the EBT vendor system, or passing of data between the portal solution, EBT vendor system and some additional Cherokee Nation MIS system?

It would be bi-directional between the MIS system and the EBT vendor's system.

- What specific data are you expecting to be passing bi-directionally?

It would need to be able to send/receive household, issuance, and redemption data.

- What exactly does it mean when referencing 'card holder, issuance, and redemption' under supporting transmission of program data?

Cardholder data would be participant data such as names, address, email, phone, etc...

Issuance data would be sending benefit data to the EBT provider to be loaded onto an online EBT card. Redemption data would be receiving data back from the online EBT provider containing information about benefits redeemed.

3. User management

- **Single sign on:** Authentication process for users regardless of the domain, platform, or technology they are using.
 - What platforms are you expecting recipients or administrators to sign into in order to have their credentials passed to the solution?

For participants – a cloud based MIS with multi-factor authentication portal login.

For administrators – cloud based login – for authentication – an identity provider to authenticate @cherokee.org users (we are a Microsoft shop, and currently use Microsoft Authenticator for MFA).

- What authentication mechanism will those other platforms be using (e.g. Active Directory, SQL user accounts, etc.)?

Unknown what method the OEBT provider will be using at this time.

- **User Roles and Permissions**

- Is it accurate to assume that part of this would be to assign permissions to applicants (participants)?

Most permissions will be around employees administering the program – applicants would only need permission to read/update fields tied to their own household record.

- **User Activity Logging**

- What specific activities are you wanting to track?

For audit purposes, we would like to track field changes by participants and program administrators. User login date/time record stamps.

4. Participant Management

- Are 'patients' different from 'participants'?

No

- **Participant contactless experience:** Allows patients access to their patient portal and manage all aspect of SEBT mobile for IOS and Android.

- Is the SEBT mobile application an existing application that is developed, owned and will be maintained by the Cherokee Nation?

See below following OR

- What are the functions included in the SEBT mobile application currently?

See below following OR

Which specific aspects of the SEBT mobile application are you wanting the participants to manage through the portal?

See below following OR

- OR
- Is the expectation that we are developing an app designed for IOS an Android for accessing their patient/participant portal through?

Yes – an app for participants to access their information in the MIS solution.

- Is a web portal that allows log in using any device that supports a modern-day browser (Chrome, Edge, Safari, etc.) sufficient?

We are seeking a Mobile App

- **Participant Communication:** Ability to customize and automate message groups and to send to individual participants.
 - Is this a general news feed and ability to chat with the participants while within the portal?

For the MIS system, we are seeking a chat bot feature that can answer basic questions and escalate to a human contact via email/phone.

- Are you looking for an interface that allows you to select x-number of individuals and then send them each individual messages with the same message?

Yes

- What's the expectation for the means in which they receive this information?
 - Portal chat box, email, text message, voicemail, and/or all of the above?

All of the above

- What is the goal for automating messages?
 - Is this to send out appointment reminders or balance reminders? Are these texts and emails?

Appointment reminders, general program informational updates, etc.

- **Electronic Participant and Consent Forms:** Allows participant and staff electronic signatures.
 - Do these need to be traditional style wet signatures as electronic signatures or can they be system time stamped signatures using a select font?

Does not require traditional style wet signatures.

- **Participant Portal:** Integrate a shopping portal within the participant portal to help participants utilize the mobile application for shopping in approved locations.
 - Can you elaborate on what exact type of integration you are wanting with approved locations websites?

We are looking for an MIS solution to allow participants to access information around shopping within the participant portal/mobile app. This would allow participants to see information around which stores accept Summer EBT, approved SEBT food items, etc.

- What exactly would that look like?

See above question.

- Would it have links on the portal page that would link them out to web pages for the approved locations?

Providing links to stores which accept Summer EBT cards would be helpful.

- Is the expectation here to link them out to a shopping portal using single sign on or is the expectation to pull up the shopping portal through an I-Frame or other means so they can shop within the portal itself?

An online shopping portal would be accessible either through the portal (as part of the MIS solution) or through a mobile app.

- Can we get access to the shopping portal name, technology, APIs, and documentation?

We currently do not have a shopping portal solution – ideally the MIS solution would include a shopping portal area where participants could access information related to stores accepting summer benefits, approved food items, etc.

- When you reference the mobile app, are you that the intent is that the participants will access their portal via the mobile application and that they would access shopping via their phones and/or the mobile application, and would they need that functionality to also be accessed from a PC?

The intent is that we acquire a solution that can provide participants access to their household/status information and also to store/shopping information. Both should be accessible via PC or Mobile.

5. Benefits Management

- **Benefits issuance:** Meet the needs for benefits issuance by Cash value benefit (CVB), food package, or combination.
 - What exactly does this mean?

See following responses.

- Does this mean management of the cards?

No.

- Would the Cherokee Nation manage the cards including creation, adding funds to the associated accounts and distribution of the cards?

The MIS solution would need to be able to pass the data to the online EBT provider (so that data can be loaded onto a new or existing participant's card).

- Will we be given a list of requirements for determining if recipients meet the needs for benefits issuance?

Yes – we have requirements that have to be met for a household application to be approved before that data can be sent to an EBT provider for issuance.

- **Electronic Benefits Transfer (EBT):** Work with EBT providers to help issue benefits to participants and ensure benefit balance are updated.
 - How exactly would you expect the portal to work with the EBT vendor system to issue benefits and ensure that their balances are updated?

The MIS system would house participant data – data for approved households would then be sent to the EBT system which would load benefits for approved households.

6. Documentation

- **Encounter Notes:** Allow for detailed documentation of participant encounters.
 - This too references 'patients'. This sounds like a clinical interaction. What is the difference between 'patients' and 'participants' in relation to this line item.

This is a type – it should be participant, not patient.

- Is this related to direct calls or interactions with participants and Cherokee Nation staff?

Yes – this would just be documenting notes to the participant record when they interact with staff.

- Is this where the Cherokee Nation staff person would enter in notes (text) like a doctor would enter chart notes?

Yes

- Is the expectation to have an electronic form for staff to document the information into?

No – it could be a text field for logging notes to on the participant’s record.

- **Templates and forms**

- Is this a clinical interaction or a food related interaction?

This would be for an interaction between program staff and participant (the ability to log notes when contact is made with a participant).

- **Bar code scanning**

- Who exactly would be doing this bar code scanning?

Program staff.

- Where exactly would this scanning be performed?

On-site and remotely.

- How would the users doing the scanning be authenticating to the portal system?

This would be normal staff with a login authenticated to the MIS system.

- What hardware device would they be using to do the scanning?

TBD

- Is this data (from the barcodes) stored in association to an individual participant or to the 'approved locations' in the system overall?

It could be stored in its own table then relations established to other information (store/location).

7. Data Exchange and Interoperability

- **Interoperability with Other Systems:** Enable seamless data exchange with other Tribal, state, or organization.

- Do we know what systems we would be integrating with to perform these seamless data exchanges?

No

- Do these systems have APIs available?

EBT provider will have APIs available (most likely REST and flat files for ETL)

- **Streamline Certification:** Integration with other available program systems for streamlines enrollment (SNAP, Medicaid, TANF, etc.). Capture required information from SNAP, FDPIR, Department of Education, and other systems to streamline the certification process for households.
 - What integration methods (e.g. API's, web services, etc.) do these other systems provide?

EBT provider will most likely have REST and flat files for ETL.

- Record linkage
 - When you reference 'linked across certifications', what specific certifications would the portal be linked to?

Certifications for SNAP, TANF, FDPIR, Medicaid, etc. (Participant certifications that are acceptable for streamline certification of Summer EBT participation.

- Is the expectation that when the information from linked systems is obtained, would the consolidation of children into households be done in the portal system, or in another system that is not part of the scope of this project?

Within the portal system.

8. Reporting and Analytics

- **Custom Reports:** Allow for the creation of custom reports based on specific criteria.
 - Are you wanting to interface a reporting tool (e.g. Power BI, etc.) to this portal system and produce the reports there, or to have all reporting created by and within the portal?

Within the portal solution would be ideal.

- Would you want all of the reporting to be displayed within the portal to the administrative staff?

Yes – a reporting section within the system would be ideal.

- **Data Analytics**
 - Is this running analytics against public health systems (separate from portal)?
 - What would those systems be?

Irrelevant at this time.

- **Management Dashboard:** Generate performance metrics and dashboards
 - How many dashboards?

TBD

- How many performance metrics for each?

TBD

- **Time and Effort tracking:** Tracking and reporting activities of staff, clinics, and our organization.

This would be more for system audit – tracking logins/record changes.

- Are you wanting a full-time tracking system for the portal?

No

- Would staff need to be able to 'clock in' and 'clock out'?

No

- What role would clinics play in this?

Clinics should be removed here; it would be tied to any staff (not clinic).

- What specifically do you mean by 'organization' Type –

Your should be our.

- What type of reports are you hoping to generate?

This would be system activity for audit purposes (staff logins, record changes, etc..)

9. Security and Privacy

- **Access Control:** Enforce strict access controls based on user roles.
 - How many access controls are we suspecting?

For role-based access controls, we would not expect many (sys admin, program staff, read-only for audit, participant(if a role is required))

- **Compliance**

- You mention HIPPA compliance. Would this system contain PHI?

HIPPA / PHI references should be removed – system will contain PII.

- Is there a clinical component to this?

No

10. Mobile and Remote Access

System Maintenance and Support

- **Training:** Offer trainings programs for users to ensure effective use of the system.
 - Who specifically would be the target audience for this training?

SEBT and WIC Staff

- You mention 'users'. Is that referring to training the participants?

No

- What would you envision those training programs to look like?

On-Line

- Would any of this training take the form of CBT's?

Unsure

- Does this include only online training programs or are you also looking for onsite training with individual stakeholders as well?

Unsure

- If personal training is required on the solution, would we be doing a train the trainer technique or training individual stakeholders?

Unsure

- If so, how many staff would we be expected to train?

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- Would these trainings be held virtually or in person?

Unsure

11. Scalability and Performance:

- **Scalability:** Ensure the system can handle increased data volume and user load.
 - If additional servers are required to ensure stability for an increased volume outside of the original scope, are we able to renegotiate the contract to accommodate for those additional requirements?

Renegotiation process/frequency can be built out within the contract.

12. What is the allocated budget for this opportunity?

TBD

13. Is there a possibility for extension in the due date? We request the nation to extend the proposal due date. A week's extension will help us in drafting a proposal response that best addresses the technology requirements.

An extension is not available at this time.

14. Is there any incumbent for this project? If there is, are they participating in this solicitation?

Unsure

15. Does the Cherokee Nation currently have a Management Information System (MIS) for SEBT, or will this be a completely new implementation?

We have utilized a couple of different custom developed solutions in the past but are looking for a fit-for-purpose MIS solution for SEBT to handle streamlined and application certifications. This will be a new solution implementation.

16. What databases or platforms are currently in use? Are there any existing integrations with state or federal programs?

A custom solution utilizing Azure. In the past, we have used an ETL process for state/federal program data.

17. What data exchange standards do you currently follow?

NIST FIPS

18. Who is the current EBT provider, or will a new one be selected for this project?

A new online EBT provider will be selected.

19. How do you currently handle EBT card issuance and fund distribution? What is the current process for participant enrolment? Is it paper-based, manual, or digital?

All of these by program requirements.

20. How do participants currently interact with the program (apply, check benefits, update information), and what are the pain points in the existing process?

N/A

21. Can you please provide more specific details about the participant portal? What functionalities should the participant portal provide beyond checking balances?

Applying for the program, updating household informational changes, general information and guidance, help/contact guidance.

22. What is the expected timeline for the full implementation of the solution once the vendor is selected?

Summer 2026

23. Does the nation have any hosting preferences?

Cloud-based

24. Does the project require migration data from existing applications?

TBD – not required but would like the option to import historic data in the future from past systems.

25. Do we need to provide references and case studies for past projects? If yes, then how many are required?

Please do.