

RFP 23ITS0695
California Connect (CAC) Equipment Processing Center (EPC)
Question and Answer Set #1

Q	Section/Document(s)	Page	Question	State Response
1	RFP Part 1, Section 3.3.3 Key Staff Qualification	41	Are we required to have all Key Staff for the contract employed at the time of bid submission?	No. Bidders are not required to have all proposed Key Staff employed at the time of bid submission. Bidders shall identify proposed Key Staff and demonstrate that the required qualifications and experience requirements are met in accordance with the RFP.
2	Attachment 23: EPC Program Information	2	What types of queries are currently received in present CS and what is the average call length?	Customer service queries generally include equipment requests, equipment troubleshooting, order status, shipping/returns, certification form assistance, appointment coordination, and general California Connect program support. Historical call volume and call duration information, if available, is provided in Attachment 23 for bidder planning purposes only. The State has not provided a guaranteed average call length. Bidders remain responsible for their proposed staffing model and solution. Reference: RFP Part 1, Section 1.4.1 (Current Environment); RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Contact Center Operations); Attachment 23: EPC Program Information.
3	Attachment 23: EPC Program Information	2	What is the average duration of video / ASL calls?	Video/ASL call duration varies based on customer communication needs and issue complexity. Historical information, if available, is provided in Attachment 23 for bidder planning purposes only. Bidders shall base their proposals on the requirements of the RFP and remain responsible for their proposed staffing model and solution.
4	Attachment 23: EPC Program Information	2	Is there a requirement for in person CS for Customer Will Call/pick up?	No. The RFP does not require in-person customer service for customer will-call or pick-up. Exhibit A, Section 5 states the Contact Center is not required to operate from a centralized physical call center facility and may use a remote, hybrid, or facility-based staffing model subject to CPUC approval. Bidders shall propose a solution that meets the requirements of the RFP. Reference: Exhibit A, Section 5 (Location and Availability); RFP Part 1, Section 1.4.2 (Proposed Environment).
5	Attachment 23: EPC Program Information	2	Is there a desire to transfer any of the current staff working in the call center?	No. CPUC is not requiring the transfer of current contact center staff. Bidders are responsible for proposing a staffing approach that meets the requirements of the RFP. Reference: Exhibit A, Section 5 (Location and Availability); Exhibit A, Section 11 (Contractor's Roles and Responsibilities).
6	Attachment 23: EPC Program Information		Are all documents a part of the print jobs on standard 8.5x11 paper?	The RFP does not require that all print jobs be produced on standard 8.5 x 11 paper. Refer to the RFP requirements and available program information for bidder planning purposes. Reference: Exhibit A, Section 11.1 (Printing & Document Management Information); Exhibit A, Section 24 (Unanticipated Tasks).
7	Attachment 23: EPC Program Information	2	What is the average number of lines per outbound order/shipment to customer?	The State does not provide an average number of lines per outbound order/shipment as part of this RFP. Available historical information is provided in Attachment 23 for bidder planning purposes only. Bidders are responsible for their proposed solution and associated assumptions. Reference: RFP Part 1, Section 1.4.1 (Current Environment); Attachment 23: EPC Program Information; Exhibit A, Section 22 (Service Level Agreements); Exhibit B, Deliverable 9, Task ID 9.11.
8	Attachment 23: EPC Program Information	2	Historically, what has been the inventory turnover rate?	The State does not provide a historical inventory turnover rate as part of this RFP. Available historical information is provided in Attachment 23 for bidder planning purposes only. Bidders are responsible for their proposed solution and associated assumptions. Reference: RFP Part 1, Section 1.4.1 (Current Environment); Attachment 23: EPC Program Information; Exhibit A, Section 22 (Service Level Agreements); Exhibit B, Deliverable 9, Task IDs 9.10 and 9.11.
9	Attachment 23: EPC Program Information		For shipping calculation purposes, what is the average weight of all SKUs to be shipped to customers?	The State does not provide an average weight of all SKUs to be shipped to customers as part of this RFP. Available historical information is provided in Attachment 23 for bidder planning purposes only. Bidders are responsible for their proposed solution and associated assumptions. Reference: RFP Part 1, Section 1.4.1 (Current Environment); Attachment 23: EPC Program Information; Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit A, Section 22 (Service Level Agreements); Exhibit B, Deliverable 9 (Warehouse Operations Requirements).
10	Attachment 23: EPC Program Information/ Exhibit D Cost Workbook		Based on the Exhibit D- Cost Workbook, the anticipated number of annual inbound pallets is 400, however storage calls for 600 pallet positions. Is it anticipated that 50% of the inbound pallets are of mixed sku and need to be separated for putaway?	No. The State has not prescribed a specific assumption that 50% of inbound pallets are mixed SKU pallets requiring separation for putaway. The estimates provided in Exhibit D are planning estimates only. Bidders are responsible for their proposed warehouse operations, storage methodology, and associated assumptions.
11	Exhibit A: SOW, Section 1 (Interim ERP operating approach)	187 - 188	Where ERP-managed systems or ERP Contractor resources are unavailable at Contract start or during Transition-In, the Contractor must perform CPUC-directed interim workflows with no separate payment. Please confirm (a) the anticipated scope and maximum duration of such interim operations, and (b) whether SLA assessments and liquidated damages are suspended for any period during which ERP-managed systems or resources are unavailable and the Contractor is operating under interim workflows.	Interim workflows may be required when ERP-managed systems or ERP Contractor resources are unavailable at Contract start or during Transition-In. The scope and duration of any interim workflows cannot be determined in advance and will depend on implementation circumstances. No separate payment will be made for interim operating approaches beyond payment for required EPC services. SLA assessments and liquidated damages are not categorically suspended and will be administered in accordance with the Contract. Reference: Exhibit A, Section 1.1 (Background and Purpose); Exhibit A, Section 11 (Contractor's Roles and Responsibilities – System Integration Responsibilities); Exhibit A, Section 20 (Transition of Operation to New Contractor or to State); Exhibit A, Section 22 (Service Level Agreements); Exhibit A, Section 23 (Liquidated Damages); Exhibit C (Budget Detail and Payment Provisions); Exhibit D (Cost Workbook).
12	Exhibit A: SOW, Section 1.1.B; Section 2 (Description of Proposed New System or Service)	187 - 188	Please provide the anticipated ERP procurement timeline, including ERP RFP release, contract award, and ERP platform go-live dates, to the extent known.	The ERP procurement is being conducted under a separate procurement process. ERP procurement milestones, contract award, implementation schedules, and go-live dates have not been finalized and remain subject to change. Bidders shall prepare proposals based on the requirements of this RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A, Statement of Work (ERP functions addressed under separate ERP contract).

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13	Exhibit A: SOW, Section 1.1, A. Contact Center Operations	187, 188	Section A requires the Contractor to operate the equipment Contact Center, including toll-free numbers and Video Call Support, while the Section A Exclusions state that functions managed via ACD/IVR capabilities are excluded and fall under the ERP Contract. Because inbound toll-free calls cannot be received, queued, or routed without an ACD, and voice and video support are delivered through that same platform, these provisions are in direct conflict on who owns and operates the contact center platform. We request that the CPUC resolve this ambiguity by confirming that the EPC Contractor is responsible for procuring, licensing, hosting, and managing the contact center voice and video platform, including the ACD/IVR used for equipment-related calls. Assigning platform ownership to the EPC Contractor aligns operational control with the performance and service-level accountability already placed on EPC for Contact Center operations, removes the dependency and accountability gap created by splitting platform control from contact center responsibility, and ensures uninterrupted service to consumers regardless of ERP Contract status.	The EPC Contractor is responsible for customer-facing Contact Center operations, including DVC and ASL services within the EPC scope. Enterprise communication platform functions, including IVR, ACD, routing, enterprise reporting, analytics, and related platform administration, are outside the EPC scope and will be addressed under the separate ERP procurement. Bidders shall prepare proposals based on the requirements of this RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A, Section 1.1 (Background and Purpose); Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Contact Center Operations, Use of ERP-Integrated Communication Systems, and Direct Video Calling).
14	Exhibit A: SOW, Section 5 Location and Availability / Scope Exclusions (Eligibility and Enrollment)	188, 190	The SOW excludes general program inquiries, including eligibility and enrollment, from EPC scope and states they are now managed under the ERP Contractor's scope. The ERP Contractor is defined in this RFP as a separate IT procurement managing finance, CRM, inventory, and compliance platforms, and its excluded work packages are limited to platform infrastructure, system integration, and financial management. Nothing in the RFP describes the ERP Contractor as operating a contact center or handling live consumer interactions. At the same time, the EPC Contact Center is required to assess customer needs and process equipment requests, functions that inherently require confirming a customer's eligibility and enrollment status during the interaction. Assigning real-time eligibility and enrollment consumer inquiries to a back-office systems contractor therefore appears inconsistent with the program structure and with how these functions are performed today, where eligibility and enrollment support is a core consumer-facing function of the EPC Contact Center and Field Operations. We request that CPUC confirm whether this exclusion was intended or is a drafting carryover. If intended, please specify the exact operational mechanism by which an EPC Contact Center agent is to resolve an eligibility or enrollment question raised by a customer during an equipment contact, including which entity provides the real-time answer and how that interaction is measured for CSAT and FCR. If not intended, we request that the exclusion be revised so that eligibility and enrollment customer support remains within EPC Contact Center scope, consistent with current program operations.	The EPC Contractor remains responsible for customer support activities identified in the RFP. Eligibility and enrollment activities shall be performed in accordance with the requirements, workflows, and responsibilities defined by the resulting EPC and ERP contracts. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – Contact Center Operations.
15	Exhibit A: SOW, Section II Equipment Processing Center Requirements, 8. Deliverable 8 - CAC Contact Center, iii Comprehensive Knowledge Base	191	Contact Center live customer interaction hours: Monday–Friday, 8:00 AM – 6:00 PM PT. The Contact Center's live customer interaction hours should align with the CAC Service Centers and Field Operation Specialists interaction hours (Monday–Friday, 8:00 a.m.–5:00 p.m. PT).	The Contact Center live customer interaction hours remain Monday–Friday, 8:00 AM to 6:00 PM PT, as specified in the RFP. Reference: Exhibit A, Contact Center Operations – Hours of Operation.
16	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Can the CPUC confirm that the central ERP/CRM platform acts as the sole master data generator for all unique consumer-tied barcodes? To prevent duplicate profiles and sync errors across the multi-vendor ecosystem, we assume Bidder's WMS will receive and print these tracking values rather than generate them.	The State has not prescribed a specific barcode generation, assignment, or master data management methodology beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the required integration, data management, and operational requirements of the resulting EPC and ERP environments. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – System Integration and Operational Requirements.
17	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Will the pre-generated unique barcode strings be pushed down from the ERP/CRM into Bidder's system inside the standard outbound shipping/fulfillment payload (e.g., via API or batch file) so our printing software can natively render the barcode onto the forms and packet labels?	The State has not prescribed a specific interface, barcode transmission, or integration methodology beyond the requirements identified in the RFP. Bidders shall propose a solution capable of supporting the required data exchange, fulfillment, and integration requirements of the resulting EPC and ERP environments. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); applicable integration and coordination requirements in Exhibit A.
18	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	What precise barcode symbology standard (e.g., Code 128, Data Matrix, or 2D QR Code) is required for the unique certification forms and peel-off packet labels?	The State has not prescribed a specific barcode symbology standard beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the operational and integration requirements of the RFP.

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19	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	In the event of a real-time integration or network outage between the WMS and the ERP, what is the expected exception procedure for processing urgent shipments? Does the CPUC allow the WMS to queue transactions or utilize temporary tracking logic, or must the shipment halt until the primary ERP link is restored?	The State has not prescribed specific outage-management, transaction queueing, exception-processing, or recovery methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the operational, integration, continuity, and data management requirements of the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – Contractor Responsibilities and System Integration Requirements.
20	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Could the CPUC confirm the specific vendor platform selected for the new ERP Contract (e.g., Microsoft Dynamics 365 or an alternate platform)? Will Bidders be granted direct database access, API endpoint connectivity, or access through a middleware translation layer?	The ERP procurement is being conducted through a separate procurement process and the ERP platform has not been finalized. The State has not prescribed specific data access, integration, interface, or connectivity methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the requirements of this RFP.
21	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Are formal integration specifications, interface control documents (ICDs), API schemas, or data dictionaries currently available for review? Can the CPUC share sample payloads (e.g., XML, JSON, or flat-file templates) for customer application metadata and shipping/return transactions?	Formal integration specifications, interface control documents (ICDs), API schemas, data dictionaries, and sample payloads are not available as part of this RFP. The State has not prescribed specific integration architecture, protocols, authentication methods, or data exchange mechanisms beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the requirements of this RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); applicable EPC/ERP scope and integration responsibility sections.
22	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Will these data flows be processed via real-time webhooks, synchronous REST API calls, or scheduled nightly batch files?	The State has not prescribed specific integration methods beyond the requirements identified in the RFP. Bidders shall propose integration approaches that satisfy the functional, performance, security, accessibility, and reporting requirements of the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); applicable integration and system coordination requirements in Exhibit A.
23	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	The SOW states real-time integration between the WMS and the ERP platform is managed under the ERP Contract, but the EPC contractor must "support ERP integration through requirements coordination". Could you clarify where the technical boundary lies? Are Bidders responsible for exposing APIs from our WMS for the ERP contractor to consume, or are Bidders expected to push data directly into endpoints hosted by the ERP contractor?	The State has not prescribed specific interface architectures, API ownership models, endpoint responsibilities, or data exchange methodologies beyond the requirements identified in the RFP. EPC and ERP contractors will be responsible for supporting the integration and operational requirements identified within their respective contract scopes. Bidders shall propose a solution that meets the requirements of the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); applicable ERP/EPC coordination and integration requirements in Exhibit A.
24	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Because all Automated Call Distributor (ACD) and Interactive Voice Response (IVR) platforms are managed under the ERP contract, what client-side software interface, CRM workspace extension, or softphone application must Bidders install on local workstations to consume these services?	The State has not prescribed specific client-side software, CRM extensions, workspace components, or softphone applications beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the requirements of the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – Contact Center Operations and ERP/EPC coordination requirements.

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25	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	For web chat, SMS text, email, TTY, and cloud-based online fax functionalities, does the state-provided ERP platform route these interactions directly into an agent dashboard interface, or must Bidders provision local standalone software tools to ingest these media streams?	The State has not prescribed specific agent desktop, communication-channel delivery, workspace, or client software architectures beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the requirements of the RFP and supports coordination with the ERP Contractor where required. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – Contact Center Operations and ERP/EPC coordination requirements.
26	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Since we are using the state's ACD/IVR system, what are the exact technical workstation requirements for our call center agents (e.g., localized desktop footprint, browser extension, or specialized USB headsets that our local IT network must support)?	The State has not prescribed specific workstation, desktop, browser extension, peripheral, or local network requirements beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the requirements of the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – Contact Center Operations and Contractor Responsibilities.
27	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Does the CPUC require unique serial number and barcode tracking across all distributed accessory SKUs, or is absolute serialized tracking restricted strictly to primary communication and assistive technology devices?	The RFP requires inventory controls, barcode scanning capabilities, asset tagging, and serial number tracking for applicable program equipment and assets. The RFP does not specify that every accessory SKU must be individually serialized. Bidders shall propose a solution that meets the inventory control, asset management, tracking, and reporting requirements identified in the RFP. Reference: Exhibit A, Sections 9.6 (Warehouse Management System) and 9.11 (Asset Tagging Lifecycle Reporting)
28	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Section 2 notes that no commercially available hardware is specified for State purchase. Can you confirm that Bidder is expected to entirely specify, procure, and maintain all on-site operational hardware, including high-speed production document scanners, industrial barcode printers, local networks, and facility surveillance/monitoring stations?	Yes. Contractors shall provide and maintain the facilities, equipment, systems, software, hardware, and operational infrastructure necessary to perform the Contract requirements, except where otherwise specified by the State. Reference: Exhibit A, Sections 9.5 (Equipment and Materials Required) and 9.12 (EPC and ERP Integration Framework).
29	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Who is responsible for managing the user provisioning lifecycle for our staff? Will the ERP contractor provide an Identity Provider (IdP) system (like Microsoft Entra ID/Active Directory) for Single Sign-On (SSO) integration into our WMS and Knowledge Base, or must Bidder maintain separate, localized credentials for our agents?	The State has not prescribed specific identity management, user provisioning, single sign-on (SSO), identity provider (IdP), role-based access control (RBAC), or credential management solutions beyond the requirements identified in the RFP. Contractors shall support applicable security, access control, and system integration requirements identified in the Contract. Reference: Exhibit A, Section 10 (State's Roles and Responsibilities); Exhibit A, Section 11 (Contractor's Roles and Responsibilities); Exhibit A, Section 18 (Security); Exhibit A, Section 18.2 (CPUC Information Security Provisions); Attachment 21 (Acceptable Use of Security).
30	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	The WMS must update returned equipment within one business day, and customer service reps must answer calls within 30 seconds. If the state-provided ERP platform or ACD network experiences slowness, downtime, or API timeouts, will those timeframes be automatically excluded from our monthly SLA scorecard calculations?	Service Level Agreements (SLAs) apply to the EPC Contractor's required services as identified in the Contract. Performance impacts resulting from ERP-managed systems, ERP Contractor delays, or other dependencies outside the EPC Contractor's control will be evaluated in accordance with the Contract and applicable dependency provisions. The State will not establish automatic exclusions beyond those identified in the Contract. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – System Integration Responsibilities); Exhibit A, Section 17 (Data Handling and Ownership); Exhibit A, Section 22 (Service Level Agreements); Exhibit A, Section 23 (Liquidated Damages).
31	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	If an automated sync failure or data inaccuracy occurs due to a bug in the separate ERP contractor's software, what is the formal triage and dispute resolution protocol to ensure Bidder is not assessed liquidated damages for data integrity failures?	Specific incident management, escalation, and operational governance processes will be administered in accordance with the resulting Contract. Performance assessments, service level measurements, and any applicable remedies will be evaluated in accordance with the Contract, including consideration of documented dependencies and factors outside the EPC Contractor's control. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – System Integration Responsibilities); Exhibit A, Section 14 (Escalation Process); Exhibit A, Section 15 (Corrective Action); Exhibit A, Section 17 (Data Handling and Ownership); Exhibit A, Section 22 (Service Level Agreements); Exhibit A, Section 23 (Liquidated Damages).

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32	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	What is the expected daily average and peak volume of concurrent call center agents, inbound/outbound API calls, and scanned documents that our local IT infrastructure must be sized and optimized to support?	Historical operational information available to CPUC has been provided in Attachment 23 and other solicitation materials for bidder planning purposes. The State does not provide specific concurrent user, API transaction, or document processing volume guarantees beyond the information contained in the RFP. Bidders are responsible for proposing a solution capable of supporting the requirements identified in the RFP. Reference: Attachment 23 (Historical Operational Information); Exhibit D Cost Workbook; applicable operational volume information provided in the RFP.
33	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	During the 6-month Transition-In phase, will the CPUC provide a dedicated staging or sandbox instance of the legacy CRM environment alongside the new ERP platform? This is necessary to allow Bidder to validate parallel operational workflows, data flows, and call-routing mapping matrices prior to production cutover.	The RFP requires Transition-In planning, cross-contract dependency assessment, parallel operations, and validation testing prior to production cutover. The State will provide reasonable access to required State-owned information, systems, reports, historical documentation, and existing workflows needed to support Transition-In activities. Specific testing environments, staging environments, sandbox instances, and implementation methodologies will be determined through Transition-In planning and coordination activities. The RFP does not prescribe a separate dedicated daily operations or ERP/WMS support team for the Contractor. Reference: Exhibit A, Section 10 (State's Roles and Responsibilities); Exhibit A, Section 20 (Transition of Operation to New Contractor or to State); Exhibit B, Deliverable 10 (Transition-In, if applicable).
34	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	The General Provisions require an annual simulation or parallel test of our Disaster Recovery plan. Will the CPUC require the ERP contractor and primary network providers to participate simultaneously in this test to validate end-to-end operational recovery, or is Bidder testing our infrastructure in isolation?	Contractors shall perform Disaster Recovery planning and testing in accordance with the Contract requirements. The RFP requires coordination and assessment of cross-contract dependencies where applicable; however, the RFP does not require participation by ERP Contractors, network providers, or other third parties in all Disaster Recovery tests. Participation requirements will be determined based on the operational environment, identified dependencies, and applicable testing objectives. Liquidated damages apply only as expressly provided in the Contract. Reference: Exhibit A, Section 18.2 (CPUC Information Security Provisions – Disaster Recovery); Exhibit A, Section 19 (Disaster Recovery); Exhibit A, Section 23 (Liquidated Damages).
35	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	SKU and Product Catalog Master: Can the CPUC confirm that the central ERP platform acts as the absolute master data platform for all SKU configurations, descriptions, unit-of-measure rules, and assistive technology categorization? Will new SKU records be dynamically pushed to Bidder's WMS, or will they be synchronized via a scheduled master file data drop?	The RFP anticipates coordination between EPC operations and ERP-managed systems for inventory, product, customer, and operational information. The State has not prescribed specific master data management, synchronization, integration, or data exchange methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that meets the requirements of the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – ERP/EPC Integration Framework; inventory management and data coordination requirements.
36	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Partner and Vendor Master Data: Will vendor profiles, third-party carrier details, and authorized external agency partner data be managed exclusively in the ERP and integrated to our WMS, or is Bidder expected to maintain a local database of shipping and receiving partners?	The State has not prescribed specific vendor, carrier, partner, or master data management methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the operational, reporting, and integration requirements identified in the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A – ERP/EPC Integration Framework and operational coordination requirements.
37	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Inbound Order Routing (Receipt of Goods): For incoming shipments from equipment manufacturers or returned devices from field specialists, will the ERP platform generate and push an Expected Receipt / Advanced Shipping Notice (ASN) transaction payload to our WMS to orchestrate warehouse receiving?	The State has not prescribed specific receiving transaction, Advanced Shipping Notice (ASN), expected receipt, or warehouse integration methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the receiving, inventory management, reporting, and ERP/EPC coordination requirements identified in the RFP. Reference: Exhibit A, Section 9 (Warehouse and Inventory Management); ERP/EPC Integration Framework; inventory control and reporting requirements.

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38	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Outbound Order Execution: Will all consumer equipment requests and fulfillment orders be placed and approved exclusively within the state's CRM/ERP platform, generating a dynamic outbound shipping order instruction for the WMS to pull, pack, and ship?	The State has not prescribed specific order-entry, approval, fulfillment orchestration, or ERP/WMS workflow methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the customer request, inventory management, fulfillment, reporting, and ERP/EPC coordination requirements identified in the RFP. Reference: Exhibit A – Contact Center Operations; Warehouse and Inventory Management requirements; ERP/EPC Integration Framework; order fulfillment and reporting requirements.
39	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	To prevent out-of-stock discrepancies, what is the expected trigger frequency for the WMS to push physical stock availability balances back to the ERP master platform (e.g., instant inventory deduction updates upon shipping confirmation vs. daily end-of-day reconciliation balances)?	The RFP requires the Contractor's WMS to share inventory data with the CPUC-designated enterprise platform at least nightly using CPUC-approved methods, and to update inventory, asset management, and logistics data for warehouse-held inventory daily, at a minimum. The RFP also requires status updates either daily or in real-time for warehouse-held inventory transactions and related customer ticket transactions, as applicable. Final data exchange cadence and methods will be coordinated with CPUC and the ERP Contractor in accordance with the RFP. The RFP does not prescribe a more specific synchronization trigger frequency beyond those requirements. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management and System Integration Responsibilities); Exhibit A, Section 22 (Service Level Agreements and reporting elements); Exhibit B, Deliverable 9, Task ID 9.6 (Warehouse Management System).
40	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Print Job Trigger Architecture: Will the automated daily print jobs (such as certification forms and inventory tracking labels) be triggered by real-time outbound API calls pushed from the state ERP system directly to our local print server, or will Bidder's system need to query/poll an ERP print queue at scheduled intervals throughout the day?	Database-integrated documents, including certification forms and inventory labels, are generated through database integrations supporting CPUC-designated and/or ERP workflows. The State has not prescribed a specific print job trigger architecture, including API push, queue polling, batch processing, or other integration methods. Final printing workflows, interfaces, standards, formats, and integration requirements will be established during implementation and transition planning. Contractors shall support operational printing, fulfillment, and document management requirements in accordance with the Contract. (RFP Part 2, Section 11.1, Items 2-3)
41	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Template Ownership and Layout Management: Will the layout templates for the certification forms and tracking labels be designed and maintained directly within the central ERP platform and streamed to our hardware as print-ready files (e.g., PostScript, PDF, or ZPL), or is Bidder responsible for hosting the templates locally and mapping raw ERP database strings into a local print engine?	The RFP requires the Contractor to support document generation, printing, certification forms, customer packets, labels, and related fulfillment materials necessary to perform Contract requirements. The State has not prescribed specific template ownership, document rendering, print engine, hosting, or document generation methodologies. Final document generation, template management, ownership, formatting, and integration requirements will be established during implementation and transition planning. Contractors shall support the operational requirements identified in the Contract. Reference: Part 2, Section 11.1 (Printing and Document Management Information), including Database-Integrated Documents and Certification Forms processing requirements.
42	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Print Confirmation Loop: Does the ERP workflow require a real-time hardware status confirmation loop (e.g., an outbound API call sent by the WMS confirming the print job successfully completed at the physical printer) before updating the customer's application status or inventory status registry in the ERP platform?	The State has not prescribed specific print confirmation, printer acknowledgment, document status synchronization, hardware status reporting, or ERP/WMS transaction processing methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the document generation, printing, inventory management, reporting, accessibility, and operational requirements identified in the RFP. Reference: Part 2, Section 11.1 (Printing and Document Management Information); Database-Integrated Documents; Certification Forms and Related Document Processing.
43	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Spooling and Batching Exception Logic: In the event of a high-volume peak window (up to 40,000+ items), does the ERP system handle the spooling and batch serialization of print records, or is Bidder's infrastructure expected to ingest bulk raw data arrays and manage print-spool queuing locally?	The State has not prescribed specific print-spooling, batch serialization, print queue management, bulk-print processing, or document generation architectures beyond the requirements identified in the RFP. Bidders shall propose a solution that supports the printing, document management, fulfillment, accessibility, reporting, and operational requirements identified in the RFP. Historical information provided in Attachment 23 is for planning purposes only and does not constitute a guarantee of future volumes. Reference: Part 2, Section 11.1 (Printing and Document Management Information); Database-Integrated Documents; Certification Forms and Related Document Processing.

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44	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Barcode Allocation Tiers: Will the unique barcode printed directly onto each individual certification form share the exact same ID value as the peel-off tracking barcode generated for its corresponding shrink-wrapped outer packet, or will they be distinct, parent-child linked barcodes within the ERP database system?	The State has not prescribed specific barcode allocation methodologies, identifier structures, parent-child relationships, tracking hierarchies, or database linkage models beyond the requirements identified in the RFP. Bidders shall propose a solution that supports inventory control, asset tracking, document management, fulfillment operations, and ERP/EPC coordination requirements identified in the RFP. Reference: Exhibit A – Inventory Management and Asset Tracking Requirements; Printing and Document Management Requirements; ERP/EPC Integration Framework.
45	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Label Stock and Hardware Specifications: Does the CPUC or the state's material standards specify a required size, adhesive type, or material durability for the peel-off barcode labels to ensure they can be easily scanned during warehouse audits without damaging the packet wrap?	The State has not prescribed specific barcode label dimensions, adhesive types, material specifications, durability standards, or manufacturer requirements beyond the requirements identified in the RFP. Contractors shall provide barcode labeling solutions that support inventory management, asset tracking, fulfillment operations, shipping activities, scanning requirements, and other operational requirements identified in the RFP. Reference: Part 2, Section 11.1 (Printing and Document Management Information); Warehouse and Inventory Management requirements; barcode scanning and asset tracking requirements.
46	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Bulk Packing and Serialization Logic: When multiple barcoded forms are combined into a single shrink-wrapped packet, will the ERP system dictate the exact number of forms per packet payload via an outbound data instruction, or is the packet creation size determined dynamically by Bidder's operational software?	The State has not prescribed specific packet assembly, packet sizing, serialization, packaging, or fulfillment workflow methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports document generation, packet preparation, fulfillment operations, inventory management, and ERP/EPC coordination requirements identified in the RFP. Reference: Part 2, Section 11.1 (Printing and Document Management Information); customer packet production requirements; fulfillment and inventory management requirements.
47	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Damaged Label Reprint Protocols: If a unique certification form or its outer peel-off packet label is damaged or fails a scanner quality check during assembly, what is the approved technical protocol for reprinting the barcode to ensure it perfectly retains its database link to the ERP record without creating a duplicate record conflict?	The State has not prescribed specific barcode reprint, duplicate prevention, record-linkage, scanner quality control, or data integrity methodologies beyond the requirements identified in the RFP. Bidders shall propose a solution that supports accurate document management, inventory control, asset tracking, fulfillment operations, and ERP/EPC coordination requirements identified in the RFP. Reference: Part 2, Section 11.1 (Printing and Document Management Information); Warehouse and Inventory Management requirements; Asset Tracking and Reporting requirements.
48	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Target Repository Destinations: What specific state cloud storage or document repository platform (e.g., SharePoint, Content Server, or an ERP-native document attachment layer) will the digitized PDF files be directly uploaded to via our capture pipeline?	The State has not prescribed a specific document repository, cloud storage platform, content management system, or document storage architecture beyond the requirements identified in the RFP. Contractors shall support document digitization, document management, records retention, accessibility, security, and ERP/EPC integration requirements identified in the RFP. Final repository architecture, storage methods, and integration requirements will be established during implementation and transition planning. Reference: Part 2, Section 11.1 (Printing and Document Management Information); document digitization requirements; ERP integration requirements.
49	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Metadata Fields and Injection API: What are the exact metadata fields (e.g., Application ID, Scan Date, Operator ID, Barcode Serial) required for extraction from each form? Is there an established REST API or web service endpoint provisioned by the ERP contractor specifically for injecting this metadata alongside the uploaded document file?	The State has not prescribed specific metadata schemas, document indexing fields, API endpoints, web services, payload structures, document ingestion interfaces, or document management integration methodologies beyond the requirements identified in the RFP. Contractors shall propose a solution that supports document management, records retention, inventory traceability, customer record integrity, reporting, and ERP/EPC integration requirements identified in the RFP. Reference: Part 2, Section 11.1 (Printing and Document Management Information); document digitization requirements; ERP integration requirements; inventory tracking and reporting requirements.

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50	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Exception Queue and Scan Errors: If a physical form is torn, smudged, or has a barcode that fails validation checks during high-volume processing, how should our capture software flag this transaction? Does the state ERP platform provide an "Incomplete Documents" exception queue, or must Bidder host a local workflow system to manage scan error resolutions before data entry occurs?	The State has not prescribed specific document exception processing, scan-error handling, barcode validation, exception queue management, workflow routing, or document remediation methodologies beyond the requirements identified in the RFP. Contractors shall propose a solution that supports document management, document quality control, inventory traceability, customer record integrity, reporting, and ERP/EPC integration requirements identified in the RFP. Reference: Part 2, Section 11.1 (Printing and Document Management Information); document digitization requirements; inventory tracking and reporting requirements.
51	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	ERP-to-WMS Serialization Syncing: When new inventory is received directly from manufacturers, will the ERP system pre-load and transmit the authorized manufacturer serial numbers to our WMS via an Advanced Shipping Notice (ASN), or is Bidder's WMS expected to capture, register, and sync these serial numbers from scratch upon physical arrival at the warehouse center?	The State has not prescribed specific inventory serialization, serial number registration, Advanced Shipping Notice (ASN), inventory onboarding, receiving transaction, or ERP/WMS synchronization methodologies beyond the requirements identified in the RFP. Contractors shall propose a solution that supports inventory management, asset tracking, receiving operations, reporting, reconciliation, and ERP/EPC coordination requirements identified in the RFP. Reference: Exhibit A, Section 9 (Warehouse and Inventory Management); inventory control, asset tracking, receiving, and reporting requirements.
52	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Asset Decommissioning and Certification: For physical hard drives, scanning endpoints, or label printers being decommissioned or replaced during the contract term, will the CPUC require Bidder to provide formal, certified destruction logs matching NIST SP 800-88 Sanitization or Destruction guidelines?	Refer to Exhibit A: Statement of Work, Section 18.2 - CPUC Information Security Provisions. NIST 800-88 is the required framework. No CPUC-specific destruction log template is required, but the Contractor must maintain documentation supporting the sanitization method used. A certificate of destruction is preferred where warranted.
53	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Ephemeral Data and Cache Purging: Does the document digitization pipeline require automated script rules to purge locally cached image files or temporary database copies using NIST SP 800-88 compliant overwriting methods immediately upon a successful upload confirmation to the ERP platform?	Refer to Exhibit A: Statement of Work, Section 18.2 - CPUC Information Security Provisions. The existing security language is sufficient. Contractors must ensure temporary working files and local copies are handled consistent with NIST data lifecycle control requirements. No additional timing or method is required beyond secure handling and non-retention.
54	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	State-Mandated EDR/MDR Toolsets: Does the State of California or the CPUC mandate a specific, pre-approved Endpoint Detection and Response (EDR) vendor solution to satisfy SIMM 5335-A requirements, or is Bidder free to deploy our own enterprise endpoint protection software as long as it aligns with the policy?	Refer to Exhibit A: Statement of Work, Sections 18.1 and 18.2, and Exhibit E: General Provisions - Telecommunications, Section 21.19.2. The State does not require a specific EDR, MDR, antivirus, or endpoint protection toolset. Contractors may propose their own toolset if it meets the solicitation's security controls.
55	Exhibit A - Sections 8, 11, 17 (ERP Integration / Operations)	193	Log Retention and Incident Reporting Windows: Under the NIST SP 800-53 MODERATE framework, what is the mandatory retention period for network and system event logs (e.g., 90 days active, 1 year archived)? Additionally, per the SOW's two-hour discovery rule, is there a designated automated ticketing system or API endpoint for reporting potential indicators of compromise?	Refer to Exhibit A: Statement of Work, Sections 18.1 and 18.2. The Contractor may use its own tools. Where discrepancies exist, Section 18.2 is controlling. Contractors must follow the retention, monitoring, and incident response requirements stated in the solicitation.
56	Exhibit A, Section 11, A. Contact Center Operations	194	For the 24/7/365 Disaster Call Services, how will after-hours routing toggle from standard business hours to our on-call network? Will the state's IVR dynamically execute call-forwarding to Bidder-designated external mobile lines or SIP endpoints?	The RFP requires support for applicable disaster response, emergency operations, and business continuity requirements. The State has not prescribed specific after-hours call routing configurations, IVR forwarding logic, SIP endpoint integrations, mobile call-forwarding methodologies, or contact center routing architectures. Contractors shall propose solutions that support the operational, accessibility, business continuity, and emergency response requirements identified in the RFP. Reference: Exhibit A – Contact Center Operations requirements; Business Continuity and Disaster Recovery requirements; customer support service requirements.
57	Exhibit A, Section 11, A. Contact Center Operations	195	Per Section 21.15.1 of the General Provisions, the State reserves the right to execute external operating system, web application, and database vulnerability scans. Will the CPUC ISO require white-listed administrative access or specialized agents installed within Bidder's environment to perform these online inspections?	Refer to Exhibit A: Statement of Work, Section 18.2 - CPUC Information Security Provisions, and Exhibit E: General Provisions - Telecommunications, Section 21.15. No additional scanning types are required beyond what is stated in the solicitation. CPUC does not mandate authenticated or agent-based scans unless already specified in the solicitation.
58	Exhibit A, Section 11, A. Contact Center Operations	194	The SOW states authorized CPUC staff will be granted access to the WMS and Knowledge Base. Is Bidder expected to provide these software user licenses to the state at no additional cost, or will the state provision its own user access mechanisms?	The Contractor shall provide authorized CPUC personnel with access to Contractor-provided systems, records, reporting tools, knowledge bases, inventory management systems, and other operational resources as required to support contract administration, oversight, monitoring, audit, and program operations. The RFP does not establish separate State-provided licensing mechanisms or additional compensation for such access. Bidders shall include required access capabilities within their proposed solution. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Comprehensive Knowledge Base and Warehouse Management System requirements); Exhibit B, Deliverable 8 (CAC Contact Center Requirements); Exhibit B, Deliverable 9, Task ID 9.6 (Warehouse Management System).

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59	Exhibit A, Section 11, A. Contact Center Operations	194	Validating Cryptographic Modules: To comply with FIPS 140-3, can the CPUC confirm that all native encryption mechanisms within our WMS database and communication tools must utilize cryptographic modules explicitly validated by the NIST Cryptographic Module Validation Program (CMVP)?	Refer to Exhibit A: Statement of Work, Section 18.2 - CPUC Information Security Provisions, and Exhibit E: General Provisions - Telecommunications, Section 21.5. Section 18.2 is sufficient for FIPS 140-3, encryption, and SFTP requirements. CPUC is not adding component-specific FIPS validation requirements beyond what is already stated.
60	Exhibit A, Section 11, A. Contact Center Operations	194	If the ERP RFP has not been launched at time of award, will Contractor be responsible for providing CRM?	CRM and ERP platform functions remain outside the EPC Contractor's scope unless expressly stated in the Contract. The EPC Contractor will be provided access to CPUC-approved systems, tools, workflows, and operational processes necessary to perform Contract responsibilities. Future ERP implementation and transition activities may result in changes to system architecture, platform ownership, or operational processes and will be managed through the applicable State contracts and transition planning activities. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A, Section 1.1 (Background and Purpose); Exhibit A, Section 11 (Contractor's Roles and Responsibilities – System Integration Responsibilities); Exhibit A, Section 17 (Data Handling and Ownership); Exhibit A, Section 20 (Transition of Operation to New Contractor or to State).
61	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	When telecommunications equipment, assistive technology devices, and accessories are distributed, are they processed and shipped strictly as individual, standalone SKUs? Alternatively, does the CPUC require bundling, custom kitting, or physical assembly of multi-component accessory packages prior to fulfillment?	Equipment, assistive technology devices, and accessories may be distributed individually or as part of a bundled, configured, or customer-specific solution based on customer needs and program requirements. Contractors shall support inventory management, configuration, fulfillment, packaging, distribution, shipping, and related operational requirements identified in the RFP. Reference: RFP Part 1, Section 1.4.2 (Proposed Environment); Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit B, Deliverable 9 (Warehouse Operations Requirements); Exhibit D (Cost Workbook).
62	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Upon the service commencement date, is Bidder expected to ingest historical consumer records, open order backlogs, or historical inventory tracking telemetry into our new WMS, or will we start strictly with a clean database at baseline?	Transition and data migration requirements will be governed by the Contract and approved transition plans. Contractors should assume existing program operations, records, inventory information, and open activities may require transition support. ERP migration, ERP data transfer, and ERP platform administration remain outside the EPC Contractor's scope unless expressly stated in the Contract. Reference: Exhibit A, Section 17 (Data Handling and Ownership); Exhibit A, Section 20 (Transition of Operation to New Contractor or to State); Exhibit B, Deliverable 10 (Transition-In, if applicable); Exhibit B, Deliverable 11 (Transition-Out, if applicable).
63	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Image Quality and Compliance Standards: Does the CPUC or State Chief Information Officer mandate specific technical compliance standards for the scanning pipeline, such as a minimum resolution (e.g., 300 DPI), specific file-type constraints (e.g., text-searchable PDF/A vs. standard TIFF), or specific color profiles (grayscale vs. color)?	The State has not prescribed specific scanning resolutions, file formats, color profile requirements, or OCR quality standards beyond those identified in the Contract. Contractors shall propose solutions that satisfy applicable Contract requirements. Reference: Exhibit A, Section 11.1 (Printing & Document Management Information); Exhibit A, Section 18 (Security); Exhibit A, Section 18.2 (CPUC Information Security Provisions); Exhibit A, Section 26 (Contractor Deliverables Format).
64	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Serialization Scope by Device Category: Can the CPUC confirm which specific product tiers require unique serial number tracking within the WMS? Is strict serialization restricted to high-value telecommunications and assistive technology devices, or does it extend to standard accessory SKUs (e.g., cables, power adapters, neckloops)?	The State does not prescribe specific inventory management methodologies. Contractors shall maintain inventory controls sufficient to track, manage, and report program devices and equipment in accordance with Contract requirements, including asset tracking, barcode/scanning capabilities, serial number handling, and required reporting. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit B, Deliverable 9, Task ID 9.6 (Warehouse Management System); Exhibit A, Section 22 (Service Level Agreements and warehouse reporting elements).
65	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Lot / Batch Tracking Requirements: Do any consumable program supplies, sub-assembly parts, or specific assistive accessories require lot or batch-number tracking instead of—or in addition to—individual serialization to support recall workflows?	The State does not prescribe specific lot, batch, or serialization methodologies. Contractors shall maintain inventory controls sufficient to support tracking, reporting, and operational requirements identified in the Contract. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit B, Deliverable 9, Task IDs 9.6, 9.10, and 9.11; Exhibit A, Section 22 (Service Level Agreements and warehouse reporting elements).
66	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Accessibility Auditing and VPAT Requirements: Will the CPUC require Bidder to provide formal Voluntary Product Accessibility Templates (VPATs) or independent third-party accessibility audit reports for our chosen WMS and Knowledge Base user interfaces before they can be approved for operation?	Contractors shall comply with applicable accessibility requirements identified in the RFP and Contract. The State has not prescribed specific VPATs or independent third-party accessibility audit reports for the WMS or Knowledge Base beyond those requirements. Refer to RFP Section 1.5 - Americans with Disabilities Act (ADA); Exhibit A: Statement of Work, Section 11, Deliverable 8 - CAC Contact Center, iii. Comprehensive Knowledge Base; Exhibit B: Deliverables and Milestones Table, Task IDs 8.12 and 9.6; and Exhibit E: General Provisions - Telecommunications, Sections 13.2 and 13.3.
67	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Security Telemetry Sharing: Will Bidder be required to feed endpoint security logs and threat alerts from our workstations directly into a state-managed Security Information and Event Management (SIEM) system or Security Operations Center (SOC) platform?	Refer to Exhibit A: Statement of Work, Section 18 - Security. The State has not prescribed specific SIEM, SOC, or security monitoring integration requirements beyond the requirements in the Contract.
68	Exhibit A, Section 11, 5. Equipment & Inventory Management	194	Formal Security Assessment Boundaries: Will the CPUC or the California Department of Technology (CDT) require Bidder to complete a formal System Security Plan (SSP) and a Security Control Assessment (SCA) to verify compliance with the NIST SP 800-53 MODERATE control baseline prior to final cutover authorization?	Refer to Exhibit E: General Provisions - Telecommunications, Sections 21.3 and 21.15, and Exhibit A: Statement of Work, Section 18 - Security. Any required security documentation, assessments, testing, or compliance evidence shall be provided as identified therein.

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69	Exhibit A: SOW, Section II Equipment Processing Center Requirements, 5. Location and Availability - EPC Site and Contact Center Facilities	207, 208, 339	The Contractor shall develop, maintain, and continually update a comprehensive Knowledge Base. On page 339, it states that the Knowledge Base (KB) platform is part of the ERP platform and is not within the EPC scope. Can you please clarify whether the KB is being provided and managed under the ERP platform, or if it remains within the EPC scope?	The Knowledge Base remains within the EPC Contractor's operational scope. The Contractor shall develop, maintain, and continually update the Knowledge Base. The Knowledge Base may be maintained in a Contractor-hosted or Contractor-selected tool; however, authorized CPUC staff must have ongoing view access and export access upon request, and CPUC retains ownership of the Knowledge Base content and related service data. Refer to Exhibit A: Statement of Work, Section 11, Deliverable 8 – CAC Contact Center, iii. Comprehensive Knowledge Base, and Exhibit B: Deliverables and Milestones Table, Task ID 8.12.
70	Exhibit A: SOW, Section II Equipment Processing Center Requirements, 8. Deliverable 8 – CAC Contact Center, vi. Mail Handling	209	The Contractor shall log and track mail intake and outbound activity in the CPUC-designated integrated platform and shall store mail retrievable in a secure location for six (6) months, with archiving thereafter and retrieval of specific records upon CPUC request. Does the contract require mail to be stored for six months and archived thereafter, with retrieval of specific records upon CPUC request. Is there a separate records retention schedule that specifies when archived records may be destroyed, or are archived records required to be retained indefinitely for retrieval purposes?	Contractors shall comply with the records retention, archival, retrieval, and disposition requirements identified in the Contract and applicable State policies. The Contractor shall log and track mail intake and outbound activity in the CPUC-designated integrated platform, store mail retrievable in a secure location for six months, archive thereafter, and retrieve specific records upon CPUC request. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Mail Handling); Exhibit A, Section 17 (Data Handling and Ownership); Exhibit A, Section 18 (Security); Exhibit A, Section 32 (Operation Reports).
71	Exhibit A, Section 11.1 Printing & Document Management Information	211-212	Can you specify if the volumes for standard documents (1-40,000) is annual or monthly pages, and for non-print jobs (1-1,000) annual or monthly specialty items/ labels to be printed.	The volumes provided in the RFP, Attachment 23, and Cost Workbook are annualized planning estimates intended to support proposal development. Actual volumes may vary during the Contract term. These volume ranges do not establish guaranteed monthly or annual volumes. Reference: Exhibit A, Section 11.1 (Printing & Document Management Information); RFP Part 1, Section 1.4.1 (Current Environment); Attachment 23: EPC Program Information; Exhibit D (Cost Workbook).
72	Exhibit A, Section 17. Data Handling & Document Management	239	For the document digitization pipeline, does the CPUC mandate a specific Optical Character Recognition (OCR) or document capture software platform to interface with the state repository, or is Bidder free to design its own capture pipeline?	The State has not prescribed a specific OCR, document capture, or digitization platform. Contractors shall propose solutions that satisfy the functional, security, accessibility, data handling, deliverable-format, and operational requirements identified in the Contract. Reference: Exhibit A, Section 11.1 (Printing & Document Management Information); Exhibit A, Section 17 (Data Handling and Ownership); Exhibit A, Section 18 (Security); Exhibit A, Section 18.2 (CPUC Information Security Provisions); Exhibit A, Section 26 (Contractor Deliverables Format).
73	Exhibit A Sections 18-19 Security & Disaster Recovery	240	Section 8 and Section 17.2 of the SOW dictate that physical data storage must reside strictly within the continental United States (CONUS). If Bidder utilizes a secure, multi-tenant public cloud infrastructure (e.g., AWS GovCloud or standard AWS US Regions) located within CONUS, does the CPUC require fully dedicated, logically isolated single-tenant database instances to host program data?	Contractors shall comply with the data residency, privacy, security, and hosting requirements identified in the Contract and applicable State policies. The State has not prescribed a specific single-tenant or multi-tenant architecture beyond those requirements. Refer to Exhibit A: Statement of Work, Sections 9 and 18.2; Exhibit B: Deliverables and Milestones Table, Task ID 1.19; and Exhibit E: General Provisions - Telecommunications, Sections 21.9 and 21.12.
74	Exhibit A Sections 18-19 Security & Disaster Recovery	240	Shelf-Life and Expiry Date Constraints: Are any of the program-issued communication devices, specific assistive technologies, or components (such as specialized internal lithium-ion batteries or disposable accessories) subject to shelf-life constraints, expiration dates, or manufacture-date aging rules that must be tracked within the WMS to enforce First-In, First-Out (FIFO) or First-Expired, First-Out (FEFO) picking rules?	The State does not prescribe specific inventory management methodologies, including FIFO or FEFO controls. Contractors shall maintain inventory controls sufficient to manage, track, and report program equipment and materials in accordance with Contract requirements. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit B, Deliverable 9, Task IDs 9.6, 9.10, and 9.11; Exhibit A, Section 22 (Service Level Agreements and warehouse reporting elements).
75	Exhibit A Sections 18-19 Security & Disaster Recovery	240	Assistive Technology Compatibility: What specific screen readers (e.g., JAWS, NVDA), voice recognition software, or other digital assistive technologies must our staff-facing and visitor-facing software interfaces be technically validated against to ensure strict Section 508 compliance?	Contractors shall ensure compliance with applicable accessibility requirements identified in the RFP and Contract. The State has not prescribed specific screen readers, voice recognition products, or assistive technology testing tools. Refer to RFP Section 1.5 - Americans with Disabilities Act (ADA); Exhibit A: Statement of Work, Section 11, Deliverable 8 – CAC Contact Center; Exhibit B: Deliverables and Milestones Table, Task ID 8.5; and Exhibit E: General Provisions - Telecommunications, Sections 13.2 and 13.3.
76	Exhibit A Sections 18-19 Security & Disaster Recovery	240	SFTP Key and Certificate Management: For SFTP data exchanges, will the CPUC's IT division manage and issue the required secure certificates and SSH keys, or is Bidder expected to generate and establish the secure public/private key infrastructure?	Contractors shall support secure data exchanges in accordance with Contract requirements. Specific connection, certificate, credential, and key management processes will be established during implementation and integration planning. Refer to Exhibit A: Statement of Work, Section 18.2 – CPUC Information Security Provisions, and Exhibit E: General Provisions - Telecommunications, Sections 4.3 and 21.5.
77	Exhibit A: SOW, Section 9.2 Contact Center Performance Objectives (Average Abandonment Rate); Section 12.1	259; 263	The Average Abandonment Rate (4% or less per LDN, English-language LDNs, measured monthly) appears as an objective in Section 9.2 but is not listed among the liquidated-damages metrics in Section 12.1. Please confirm whether the Average Abandonment Rate carries any liquidated damages, or whether it is monitored and reported only.	Liquidated damages apply only to the performance measures expressly identified in the Contract's liquidated damages provisions. Other performance measures may be monitored and reported in accordance with Contract requirements. Average Abandonment Rate is monitored and reported in accordance with the Contract; it does not carry liquidated damages unless expressly identified in the Contract. Reference: Exhibit A, Section 22 (Service Level Agreements), including Sections 9.2 and 12.1; Exhibit A, Section 23 (Liquidated Damages).
78	Exhibit A: SOW, Section 9.2 Contact Center Performance Objectives (Average Abandonment Rate); Section 12.2	259	For the Daily Average Time in Queue metric, the objective is 30 seconds or less for all calls on a daily basis. However, the note states that "this objective applies to English-language LDNs only." Does this mean that only English calls are included in the measurement, and that Spanish, Mandarin, Cantonese, Other languages, ASL, and TTY calls are excluded from this performance metric?	The Daily Average Time in Queue objective applies to English-language LDNs as specified in the Contract. Performance requirements for other languages and communication channels are governed by their respective Contract provisions. Reference: Exhibit A, Section 22 (Service Level Agreements), including the Contact Center performance objectives, reporting elements, and definitions.

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79	Exhibit A: SOW, Section 9.2 Contact Center Performance Objectives (Average Abandonment Rate); Section 12.3	259	Same as above, Does this same exception apply to the Average Abandonment Rate metric, meaning that only English-language calls are measured for that objective as well? The note states that "this objective applies to English-language LDNs only.	As stated in the Contract, the Average Abandonment Rate objective applies to English-language LDNs. Performance requirements for other languages and communication channels are governed by the applicable Contract provisions. Reference: Exhibit A, Section 22 (Service Level Agreements), including the Contact Center performance objectives, reporting elements, and definitions.
80	Exhibit A, Section 22, 9.7 Warehouse- Return Quality Control and RMA Testing Objectives	262	What specific testing, hardware diagnostics, and component data elements must the WMS capture during return merchandise authorization (RMA) processing, and what are the mandatory disposition states required to sync back to the ERP platform?	The State has not prescribed specific testing procedures, diagnostic data elements, disposition codes, or RMA workflows beyond the requirements identified in the Contract. Contractors shall propose solutions that satisfy Contract requirements. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit B, Deliverable 9, Task IDs 9.6, 9.7, 9.9, 9.10, and 9.11; Exhibit A, Section 22, Sections 9.7 and 12.6 (Warehouse Return Quality Control and RMA Testing).
81	Exhibit A, Section 22. Service Level Agreements	262	Does the return need to be received, inspected, and dispositioned by close of next business day if received by 11a?	Contractors shall perform return processing activities in accordance with the service requirements identified in the Contract. The State has not prescribed additional return receipt, inspection, or disposition timeframes beyond those requirements. Applicable return orders received daily must be updated in WMS by the close of the next business day unless delivery is later than 11:00 AM, in which case another day is permitted. Reference: Exhibit A, Section 22, Sections 9.7 and 12.6 (Warehouse Return Quality Control and RMA Testing); Exhibit B, Deliverable 9, Task IDs 9.7 and 9.9.
82	Exhibit A, Section 22. Service Level Agreements	270	What does the Physical Inventory cycle look like? I.E. Are all SKUs to be counted 1x/yr, 'A' movers to be counted quarterly, etc.	The State does not prescribe specific inventory counting methodologies or cycle count frequencies. Contractors shall maintain inventory controls sufficient to support Contract requirements and accurate inventory management, including required physical inventory counts, variance reporting, and monthly warehouse reporting. Reference: Exhibit A, Section 11 (Contractor's Roles and Responsibilities – Equipment & Inventory Management); Exhibit A, Section 22, Sections 9.6 and 12.5 (Warehouse Inventory Control); Exhibit B, Deliverable 9, Task IDs 9.10 and 9.11.
83	Exhibit A, Section 22., 12. Service Level Agreements/12.1 Customer Care Performance Evaluation	266	What is the typical FCR Penalty Period relative to the 85%?	First Contact Resolution (FCR) performance shall be measured and administered in accordance with the performance measurement and contractual provisions identified in the Contract. FCR performance is measured against the 85% objective for Contractor-managed channels where interaction data can be reliably linked to the ERP-managed CRM/case record. Reference: Exhibit A, Section 22, Section 12.1 (Customer Care Performance Evaluation) and Section 13 (Definitions).
84	Exhibit A, Section 22, 12.1 Customer Care Performance Evaluation	266; 258	Section 12.1 assesses \$500 per measurement period in which ART exceeds 30 seconds, but the length of the measurement period is not defined. Please define the ART measurement period (daily, weekly, or monthly).	ART (Average Response Time) is defined in Exhibit A, Section 13. ART performance is assessed under the monthly Service Level Assessment process described in Exhibit A, Section 12, and any applicable liquidated damages are assessed monthly.
85	Exhibit A, Section 22. Service Level Agreements (SLAs), 10.2 Contact Center Reporting Elements Description	263-265	Confirm the reporting source(s) and system(s) of record/data source(s) for ART, Complaint Resolution Time, and FCR, as these newly introduced Customer Care penalty-based SLAs do not currently appear to have corresponding reporting and validation provisions.	ART shall be measured using data from the Contractor's EPC-managed customer interaction channels and response queues. FCR shall be measured using interaction records linked to the ERP-managed CRM/case record. Complaint Resolution Time (CRT) shall be measured using the CPUC-designated system of record from documented complaint escalation through documented resolution. The Contractor shall maintain appropriate supporting source documentation and reporting records for validation in accordance with the RFP reporting and SLA provisions. Reference: Exhibit A, Section 22 (Service Level Agreements), including Sections 10.2, 11, 12.1, and 13.
86	Exhibit D: Cost Workbook, Cost tab	Exhibit D, Cost Workbook	The number of units for each cost line item are being overstated. For example, in the 2020 RFP, 1.4M units were used for inbound calls over 5 years. The current cost sheet is showing 1.4M per year. What are the number of units based on and can this be revisited/revised to allow us to provide number of units?	The Cost Workbook reflects the information available to the State for bidder pricing purposes. Historical and projected volumes are provided as planning estimates only and do not constitute guarantees of future workload. CPUC-provided unit quantities are for cost evaluation and proposal comparison purposes only and do not represent guaranteed future usage volumes, minimum purchase quantities, maximum purchase quantities, or a State commitment regarding future demand. Bidders are responsible for developing their own pricing assumptions and submitting proposals based on the RFP requirements. Reference: RFP Part 1, Section 1.4.1 (Current Environment); Attachment 23: EPC Program Information; Exhibit D (Cost Workbook); Exhibit C (Budget Detail and Payment Provisions).
87	Exhibit D: Cost Workbook, Cost tab	Exhibit D, Cost Workbook	Clarify whether Transition In and Transition Out costs are intended to be included in the 2 year base term budget or treated separately. (The current structure appears to annualize all costs uniformly.)	Refer to Addendum 1, Exhibit C: Budget Detail and Payment Provisions.
88	Exhibit D: Cost Workbook, Cost tab, Section C, Items 14, 15, and 17	Exhibit D, Cost Workbook	Items 14 (RMA / Testing / Refurbish), 15 (RMA / Testing / Refurbish Materials), and 17 (Labels) carry substantial evaluation quantities. Please confirm whether equipment testing and refurbishment is an active, in-scope warehouse requirement under the new contract, given that testing and refurbishment is not performed at the warehouse under current operations, and confirm whether the listed quantities are firm or evaluation placeholders.	Services identified in the RFP, Exhibit A: Statement of Work, and Exhibit D: Cost Workbook are within the scope of the RFP. Quantities provided in the Exhibit D: Cost Workbook are planning estimates for proposal development purposes only and do not constitute guarantees of future workload or transaction volumes.
89	Exhibit D: Cost Workbook, Cost tab, Section D, 1. Labor Costs	Exhibit D, Cost Workbook	Are there specific tiers in the Labor Costs section that are assigned to the Key Staff requirement?	No, there are not.

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90	Exhibit E: General Provisions - Telecommunications, Section 21.18 Background Checks	110	Clarify whether requests for modifications to the General Provisions – Telecommunications will be considered? We want to confirm whether any terms—including but not limited to the background check requirement—may be proposed for revision or if all provisions must be accepted as written.	For the Telecom General Provisions, the State is willing to consider further clarification on the cited General Provisions that have a specific carve-out with the reference "Unless otherwise specified in the Statement of Work". These provisions may be considered for discussion by the State during the negotiation phase of the RFP. Please note that the decision to discuss or make any modifications to the Telecom General Provisions during the negotiation phase of the RFP shall be at the sole and absolute discretion of the State. The State will not modify or negotiate the Telecom General Provisions that do not contain carve-out language.
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