De acuerdo a los parámetros establecidos en la carta circular núm. 013-2021 "*Medidas Para Asegurar La Transparencia Y Responsabilidad Fiscal En La Contratación Gubernamental De Servicios Profesionales*" emitida el 7 de junio de 2021 por la Oficina de Gerencia y Presupuesto del Gobierno de Puerto Rico, parte v, sección a, b (i a la iii) y la Orden Ejecutiva núm. 2021-029; y a la discreción del Secretario de Salud mediante Orden Administrativa Número 2022-535 del Secretario de Salud *"Para establecer los procedimientos aplicables a la contratación de Servicios Profesionales y Consultivos que excedan la cantidad de ciento cincuenta mil dólares ($150,000.00) o más, durante un mismo año fiscal en el Departamento de Salud; y crear el comité de evaluación de propuestas para los procedimientos de "Request For Proposal" (RFP) o solicitud de propuestas selladas*", según enmendada por la Orden Administrativa 2024-581 del Secretario de Salud; se establecen los requisitos para someter propuesta para servicios profesionales.

PUERTO RICO DEPARTMENT OF HEALTH

WIC PROGRAM

REQUEST FOR INFORMATION (RFI)
MANAGEMENT INFORMATION SYSTEM (MIS)
RFI-SP-2024-2025-022-WIC

THIS IS A REQUEST FOR INFORMATION (RFI) ONLY. THIS IS NOT A FORMAL BID SOLICITATION. NO AWARD WILL RESULT FROM THIS RFI.

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Contents

Attachments to this RFI:

 A: MIS-RFI Requirements Questionnaire

Puerto Rico Department of Health
WIC Program

Management Information Systems (MIS)
Invitation Number: RFISP-2024-2025-022-WIC
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1. INTRODUCTION AND BACKGROUND

1.1. Purpose of the RFI

This Request for Information (RFI) seeks to gather information on available systems, technologies and best practices of potential suppliers providing solutions that support the WIC program and that align with our operational goals. The information obtained will be invaluable in determining the next steps to take to enable us to conduct a Sealed Request for Proposal (RFP) which will be a new bidding process.

1.1. RFI Timeline

The timeline for this RFI is presented below. All items must be received by the stated deadline.

Table 1.4.1 RFI Timeline

Target Date	Event
January 31, 2025	Publication of RFI at 5:00 pm AST
February 14, 2025	Last Day to Submit Questions (RFC) – 4:00 pm AST substas@salud.pr.gov
February 28, 2025	Issuance of answers to questions
March 7, 2025	Submission of RFI – 11:30 am AST, substas@salud.pr.gov

1.2. PRWIC Program Background

The WIC Program provides nutrition and breastfeeding education, referrals to medical and community care, and specific nutritious supplemental food to eligible individuals who are at nutritional risk, low-income, pregnant, postpartum, and breastfeeding women, infants and children, and/or children under five (5) years of age. PRWIC has clinics throughout the island to provide these essential services.

The WIC Program is a federally funded nutrition education and supplemental food program established in 1972 under Public Law 92-433. The Program was added as Section 17 to the Child Nutrition Act of 1966 and subsequently amended and included in the Child Nutrition Reauthorization Act of 2010. Federal regulations enacted under these laws are coded in Title 7, Code of Federal Regulations, Part 246.

The Puerto Rico WIC Program (PRWIC) currently has eighty-three (83) physical clinics, plus a virtual clinic, and two (2) mobile clinics covering mutually exclusive geographic areas. The primary role of the clinic is to enroll and provide services and benefits to participants. The PR Department of Health (PRDoH) administers the Puerto Rico WIC Program, and the PRWIC state office provides all staff for central management and direct participant services at the clinic level with an overall program administration.

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Clinics vary in the number of participants served. The largest clinic serves over 5,708 participants, while the smaller serves approximately fifty-five (55) participants monthly. PRWIC currently issues food benefits to approximately 87,173 participants per month.

PRWIC authorizes retailers to offer nutritious foods and infant formula that are available and prescribed in their food packages. As of October 1, 2024, the current number of authorized Vendors serving the WIC program and participants is 659, including regular and above 50 merchants.

1.3. Definitions and Acronyms

Acronym/Key Term	Definition
ASG	Puerto Rico General Services Administration
BeWIC	PRWIC MIS system name
EBT/eWIC	Electronic Benefit Transfer/EBT WIC
FNS	Food and Nutrition Services is a department in the USDA that oversees the WIC program.
FReD	FNS required Functional Requirements Document
MIS/eWIC	PRWIC Joint Implementation Project of MIS and EBT
MiWICPR	PRWIC mobile application that provides multiple services and allows communication with participants and potential participants. The application is distributed on both Apple and Android platforms
MPSC	Mountain Plain States Consortium (MIS SAM system)
NERI	Nutrition Education for Retention Initiatives is an online tool for participant educational requirements and for registering for WIC services.
OIAT	Oficina de Informática y Administración de Tecnología
PRDoH	Puerto Rico Department of Health
PRWIC	Puerto Rico WIC Program
RFI	Request for Information
RFP	Request for Proposal
SAM	State Agency Model
USDA	United States Department of Agriculture
WIC	Women, Infants, and Children
WICA	Women, Infants, and Children Authorized Vendors is the Merchant's portal that provides information on their redemptions and deposits.

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2. PRWIC CURRENT MIS SYSTEM ENVIRONMENT

2.1. PRWIC System Background

In December 2010, President Obama signed into law the Healthy, Hunger-free Kids Act, which mandates that all states implement eWIC (EBT) by October 2020. This technology provides WIC Programs with the ability to issue benefits electronically to WIC participants, eliminating the need for paper WIC checks. PRWIC successfully completed the mandated Islandwide MIS/eWIC Implementation Project on November 16, 2022. The current MIS Maintenance and Operations contract and extension options expiration date is September 30, 2027.

The constraint to implement and comply with the mandate for all states to implement by October 2020 limited PRWIC options for a modern system that would increase productivity, be user-friendly, configurable, scalable, and tailored to current needs. PRWIC implemented a new MIS system (MPSC, non-consortium, Spring version) interfaced with the selected WIC Direct EBT system (MIS/eWIC). The MPSC system was implemented with limited customizations, leaving PRWIC new requirements to be implemented through the change request process. PRWIC completed the MIS/eWIC system rollout at all clinics in November 2022. During the first year after rollout, many modifications were implemented to the MIS System through the change requests process with the MIS contractor (referred to as Contractor #1) through the Maintenance and Operations Contract.

The current MIS system still lacks many enhancements.

To expedite the development of essential functionalities in a short period and facilitate participant access to benefits, PRWIC engaged a secondary contractor (referred to as Contractor #2). Functionalities were created outside the primary MIS system, requiring Central Office staff to operate two systems and administrative staff to manage two (2) contractors.

2.2. PRWIC current Systems Environment

Responsible Contractor	Software implemented	Computer Environment
Main Contractor (M&O)	MPSC	PRWIC Data Center (OIAT)
Main Contractor (M&O)	WIC Direct	Hosted
Main Contractor (M&O)	Vendor Portal	PRWIC Data Center (OIAT)
Main Contractor (M&O)	Nutrition and Education Portal (NERI)	PRWIC Data Center (OIAT). In transition phase to a new portal.
Secondary Contractor	Web and Mobile applications described in section 2.3.3.	PRWIC Data Center (OIAT)

2.3. PRWIC Current Applications

The following applications presented in this section represent as-is since the MIS/eWIC joint implementation.

2.3.1. MIS Application (Contractor #1)

PRWIC implemented the Spring version 6.06 of the MPSC MIS system, which complies with the FNS FReD 2.0. The following modules are residing in this version of the MPSC application:

Clinic Services - Clinic Services includes all functionality necessary to bring new WIC families into the program, as well as to re-certify existing participants. The service also includes functionality for providing WIC benefits through EBT cards.

Scheduler - The Scheduler is a set of services that allows users to manage appointments for WIC families.

Operations - These services are used for the purpose of providing support in the operations area for such things as inventory and staff support.

Vendor Management - These services are used to provide support in the authorization and management of businesses that apply for and are authorized to participate in the state WIC program.

Finance - These services are used to provide support in the financial area for such things as grant management and 798 income tracking.

Food Management - These services are used to define WIC approved foods, participant profiles, food rules, and model food packages.

System Administration - These services enable the authorized user to modify data that is required for the MPSC system to work properly. This service is split into 5 services – Clinic Services, Scheduler, Vendor Management, Operations, and System-Wide services.

Reporting Service - Reporting services are used by the MPSC system architecture. They provide the capability to access data for reporting. Reporting functionality uses the Microsoft SQL Server Reporting Services 2016 SP1 (or latest SP) (SSRS) toolset. Ad hoc reporting is available using SQL Server Report Builder, whereas the managed reports are designed using Report Designer.

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Security and Session - These services are used for authentication, authorization and session management across the system. The session management is done through database where each service call ensures the valid session before the service is completely rendered.

FTPS and SFTP - These services help sending and receiving data from external entities.

2.3.2. eWIC Application (Contractor #1)

The CDP WIC Direct application is an online interface with the MIS system to process WIC participants authorized benefits at authorized WIC retailers.

2.3.3. Web and Mobile Applications (Contractor #2)

The following functionalities were developed and interfaces with the MIS system by contractor #2:

WIC Staff Backoffice 360 - A multi-modular centralized platform for 360-degree management of program participants. Thanks to its technological architecture, the platform integrates with different solutions to facilitate the work of WIC employees and can be accessed remotely securely. The platform allows WIC staff to have complete visibility of the participant's profile, class history, transferred documents, appointment history, exchanged messages, and any notes recorded in the virtual file. In addition, the platform has multiple executive dashboards and reports.

Clinic Monitoring System - A sampling and evaluation system for controlling and monitoring clinics in compliance with federal requirements. Based on an annual sample, the system facilitates and expedites monitoring at the participant file and facility levels. The system includes all stages of the monitoring process, from sampling, evaluation, recording of findings, requesting additional information, monitoring results, and establishing the corrective action plan. As a monitoring system, all results, notes, and communications through the system are kept as historical records.

Breastfeeding Peer Counseling Platform—This solution has two (2) components to digitalize the operation of peer counselors: the assignment of referrals and the attention to program participants. Its portable component facilitates counselors' remote visits to the assigned participants. In addition, the platform provides reports that facilitate the measurement of services and the control of peer counselors.

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Food Selection and Evaluation—This web-based system, presented by the Web Portal, digitally supports the authorized food evaluation and selection process. The system includes the steps of food distributors submitting foods, carrying out the flow of the corresponding evaluations, and selecting authorized WIC foods. The system allows recording all the documentation and the selection process flow with the corresponding approvals at each step. The system is integrated with the publication processes of authorized foods and the inspection processes of vendors.

Mobile App - A complete mobile application that provides multiple services and relevant information and allows communication with participants and potential participants. It is the most efficient way to connect participants with the Program. The application is distributed on both Apple and Android platforms.

Frutilina Chatbot AI – This chatbot, which uses artificial intelligence, provides information 24/7 in an automated manner. In addition, the chatbot allows certain transactions to be carried out, such as scheduling appointments. The chat's data is based on the current procedures and policies of the Program that are "fed" to the artificial intelligence engine.

Next (Queue System) - A technological solution that allows managing appointments (in person or virtual), queue management, and employee productivity in WIC clinics. Due to its technological architecture, the platform can generate real-time information for the supervision and control of clinic staff. In addition, the platform allows the deployment of official videos in all the Program clinics and has a messaging engine for participants.

Contact Center (Genesys) - A communications platform that manages virtual services in all clinics island-wide, virtual clinics, and call centers. The platform supports incoming and outgoing calls and allows monitoring and control of service levels and staff productivity.

Healthcare Providers Portal—wic.pr.gov—This is a web portal that integrates with MiWICPR and the BackOffice 360 platform to provide digital support for pediatricians and physicians prescribing infant formulas to participants. It facilitates digital requests and prescriptions and seamlessly recording such data in the participant's file. Furthermore, it enables personalized communication between the healthcare professional and WIC staff and bulk communication for notifications or sharing of relevant materials.

Vendor Inspection—An inspection system consists of two (2) components: a mobile component for on-site inspections at authorized vendors and a web-based component for planning, controlling, and recording inspection results. The mobile component allows inspectors to visit vendors and record inspection results according to predefined templates. It can operate offline and synchronize data once connectivity is established.

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The web-based component allows for viewing results, planning routes, and monitoring inspector productivity.

Vendor Training and Contract Management—The Web Portal presents a web-based system for managing compulsory training and contract signing by authorized vendors. Vendors can review the compulsory training material through the system, perform a test electronically, and obtain the corresponding certificate. Once the requirements are met, the system allows the contract to be signed by an authorized vendor.

Vendor Portal - A unified web portal to centralize all WIC merchants' access, communication, and individual management.

The main contractor developed the following functionalities (referred to as contractor #1) through the past years but were not integrated into the implemented MIS system:

Vendor WICA Portal – A web-based portal where Merchants can access Deposits, Information, Administrative, Mandatory Training, Reports, EBT ACH and EBT transactions, Vendors Surveys, Price Surveys, Gross Sales, Report POS problems, Frequent Questions, and Audits.

Vendor Selection – A web-based system for merchants to upload the documents required for the selection process. Provides a list of merchants, associated corporations, and doing business as (DBAs).

3. **PRWIC REQUEST FOR INFORMATION**

3.1. Objectives
PRWIC is looking for a new and modern system with the following criteria:
- Web Based MIS, easily configurable
- Interface with EBT processors
- Interface with web and mobile applications
- Both MIS and EBT systems are online
- Compliance with *FReD 2.0, WUMEI 2022* (WIC Universal MIS-EBT Interface Standards 2022) and the *Framework for State, Local, Tribal, and Territorial Use of Artificial Intelligence for Public Benefit Administration*

Specifically, the PRWIC Program is seeking to:
1. Improve client intake and appointment scheduling.
2. Enhance data management for participant records.
3. Track nutritional benefits.

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4. Facilitate participant access to their benefits.
5. Streamline WIC Management Services.
6. Streamline nutrition education and resources.
7. Facilitate reporting and compliance with state and federal regulations.
8. Support remote access for clients and staff.
9. Automated manual processes performed by the Vendor and Finance Departments.
10. Integrate outside web-based applications into only one platform (No interfaces).
11. Maintain only one contractor.
12. Ensure compliance with federal and state regulations.

3.2. Requirements

3.2.1. FReD Requirements

The USDA-FNS Functional Requirements Document (FReD) comprehensively describes functions for a Model WIC system. FReD (version 2.0 September 2008) consists of twelve (12) major functional areas:

1. Certification
2. Nutrition Education, Health Surveillance, And Referrals
3. Food Management
4. Food Benefit Issuance
5. Food Benefit Redemption, Settlement, and Reconciliation
6. Financial Management
7. Caseload Management
8. Operations Management
9. Vendor Management
10. Scheduling
11. System Administration
12. Reporting

3.2.2. PRWIC Functional Requirements - Enhancements

The PRWIC Program used the FReD 2.0 functional Matrix as a tool during the Needs Assessment.   PRWIC Functional Areas has identified enhancements and/or new functionalities to the current MIS system, which are described in **Attachment A**.

ENDOR INFORMATION REQUEST

3.3. Vendors Questionnaire

Vendors **must** use the questionnaire included in Attachment A of this RFI to respond to the specific questions regarding the following six (6) functional areas:

Refer to Attachment A-MIS-RFI Requirements Questionnaire

Appendix A	Contents	Instructions
(Tab 1)	FReD 2.0 Sections 1 to 12:	The potential software vendor must answer all FReD Requirements with a Yes or No. If the answer is No, you must explain how you will comply.
(Tab 2)	FReD 2.0 Sections 1 to 12 - Enhancements**:**	The potential software vendor must respond to how it will meet PRWIC enhancements.
(Tab 3)	FReD 2.0 Section 12 – PRWIC Custom Reports List:	The potential software vendor must acknowledge with a Yes on each report.
(Tab 4)	Section 13 – PRWIC added a Section for Local Customizations:	The potential software vendor must respond to how the potential software vendor will meet PRWIC Local customizations.
(Tab 5)	Section 14 - PRWIC added - Web & Mobile Interfaces	The potential software vendor must respond to how the potential software vendor will meet the web & mobile interfaces integration.
(Tab 6)	Section 15 – PRWIC added Non-Functionals Requirements:	The potential software vendor must answer all Non-Functional Requirements with a Yes or No. If the answer is No, you must explain how you will comply.

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Also, the potential software vendors **must** complete the final tab (#7) provided in the questionnaire included in Attachment A of this RFI regarding the following six (6) Vendor areas:

Tab 7	
Vendor Area	**Instructions**
Company Overview:	Vendors should provide company background and experience.
MIS Software Overview:	Vendors should provide details about their proposed software design including architecture, environment (hardware, software, communications), interfaces, other equipment, software components, security standards, compliance with WIC universal MIS-EBT interface standards, any future changes or enhancements, etc.
Implementation:	Describe a typical implementation process, approach, timeline, and deliverables, including data migration and integration with existing systems. Also, training and support options for staff and users and Change management strategies.
Maintenance and Support:	Describe ongoing maintenance, updates, and customer support plans.
Cost Estimates:	Vendors should provide general pricing structure for the solution, including initial setup, change requests costs and ongoing maintenance. Include any additional costs associated such as training, traveling and/or support. Also include hourly rate for key staff for PM, Developer, Analyst, Database resources.
References:	Vendors should provide examples of similar implementations, or References from previous clients in the public health or WIC domain. **PRWIC recommends including up to three (3) relevant references within the last 5 years.**

3.4. Submission Requirement

PRWIC expects vendors to send a simplified document with their response to this RFI. The document should have the following organization with the topics described in the Sections mentioned before and include responses to Attachment A-Tabs #1 to #7.

A. Title Page
B. Table of Contents
C. Executive Summary
D. Describe the following areas from Tab 7:
   a. MIS Software Overview
   b. Implementation Description
   c. Maintenance and Support
   d. Cost Estimates
   e. References
E. Attachment A with responses

- Submit your response electronically in PDF format by the submission deadline, an email included in Section 1.1.
- Responses should not exceed 20 pages, not including attachments or exhibits.
- Include contact information: contact person, phone number, and email.

Please note that this RFI is issued solely for information and planning purposes and does not constitute a commitment to contract with any vendor that responds.

By submitting a response to this RFI, no vendor is guaranteed a contract or any future engagement. This RFI is not a solicitation for proposals, and it does not create any obligation on the Puerto Rico Department of Health (PRDOH) to procure any products or services, or to enter into any contractual agreement. The PRDOH is not responsible for any costs incurred by a vendor for the development and provision of a response to this RFI.