

## **ADDENDUM #2**

**To:** All Prospective Bidders

**Date:** 8/31/2026

**Project Title:** Finance Enterprise Resource Planning (ERP) Replacement & Analytics Upgrade

**Publication Date:** 8/31/2026

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This Addendum is issued to modify, clarify, and/or answer questions regarding the Request for Proposals (RFP) for Finance Enterprise Resource Planning (ERP) Replacement & Analytics Upgrade. The following changes and clarifications are hereby made:

### **Item 1: Cover Page**

Issued: [8/31/2026]

Submission Deadline: [9/8/2026]

### **Item 2: Section II: INSTRUCTIONS AND CONDITIONS – 5. RFP Schedule, Pg 5.**

RFP Publication Date - [Monday, 8/31/2026]

Proposals Due - [Tuesday, 9/8/2026], by 2:00 PM PST

Short List Established and Contractual Discussions Begin - [10/9/2026]

### **Item 3: Section II: INSTRUCTIONS AND CONDITIONS – Proposal Submittal (Section II), Pg. 6**

Removal – “7.2. All questions must be submitted by [DATE], to allow sufficient time for Health Plan to issue responses to all Bidders prior to the proposal submission deadline.”

### **Item 4: Section II: INSTRUCTIONS AND CONDITIONS – Proposal Submittal (Section II), Pg. 6**

Proposals must be submitted electronically via email to [procurement@hpsj.com](mailto:procurement@hpsj.com) no later than [Tuesday, 9/8/2026], by 2:00 PM PST. Bidders are encouraged to keep submissions concise and avoid unnecessary promotional content.

#### **Item 5: Attachment A – SCOPE OF SERVICES, Pg. 26**

Health Plan seeks proposals for an experienced Vendor to provide:

- **Finance Enterprise Resource Planning (ERP) Replacement**
- **Financial Planning & Analysis (FP&A)**
- **Human Resources ADP replacement**
- **Finance Payroll ADP replacement**

#### **Item 6: Attachment A – SCOPE OF SERVICES, Pg. 26**

##### **3. Scope of Services**

The solution **must** include, at minimum, the following:

**A. Project Objective: HPSJ seeks to modernize and integrate core functions, Accounting, FP&A, and HR / Payroll by:**

#### **Item 7: Attachment A – SCOPE OF SERVICES, Pg. 26**

##### **HR and Payroll Functional Requirements:**

**Replace HR ADP and integrate with the new vendor solution:**

- Ability to track employee time and activity
- Ability to eliminate manual data entry through automation
- Ability to automate the monitoring of leave statuses and auto-enrollments
- Integrated benefits administration with electronic benefit enrollments

#### **Item 8: Attachment A – SCOPE OF SERVICES, Pg. 27**

##### **Employee Benefits:**

- Maintain comprehensive online employee files (personnel, benefits, onboarding, and related documentation)
- Automated benefit eligibility controls, including hour-based premium checks and premium adjustments after life events
- Real-time visibility into benefit updates, pay changes, and audit history
- Employee self-service access to profiles, paystubs, PTO balances, and accruals
- Automated performance and compensation tools, including evaluation dashboards and interruption-free compensation updates
- Customizable employee profile templates with configurable data fields
- Integrated applicant tracking and onboarding (resume submission, duplicate prevention, I-9 verification, data import, and auto-population of new hire profiles)
- Duplicate applicant detection (email/phone) and rehire flagging
- Consolidated, searchable online employee files

**Item 9: Attachment A – SCOPE OF SERVICES, Pg. 27**

**Payroll Administrative Services:**

- Ability to process payroll, including issuing checks and direct deposits
- Manage multiple employee payment preference
- Manage federal and state tax filings
- Manage downstream payments for benefit vendors
- Transmit required data to downstream benefit partners
- Issue and process tax forms (W-4, W-9, 1095, etc.)

**Item 10: Attachment A – SCOPE OF SERVICES, Pg. 27**

**Payroll System Functional Requirements**

The payroll module must offer:

- Ability to generate custom reports
- Ability to configure and manage custom pay codes
- Ability to record actual expenses by type and post them to the general ledger (GL)
- Ability to recognize accruals by type and post accruals to the general ledger

**Item 11: Attachment A – SCOPE OF SERVICES, Pg. 27**

**Technical & System Architecture Standards**

- Vendor must provide a modern, cloud based or hybrid ERP platform aligned with current industry best practices.
- System must support scalable financial, and analytics capabilities with minimal customization.
- Solution must include strong API and integration frameworks to connect with HPSJ systems (e.g., QNXT, ADP, APOne, Power BI, EAM).
- Platform must demonstrate high reliability, performance resilience, and disaster recovery capabilities.
- Replace ADP with a new integrated solution
- ADP data migration to the new solution

**Item 12: Attachment A – SCOPE OF SERVICES, Pg. 28**

**Implementation, Training & Vendor Standards**

- Implementation will follow a phased approach, Phase 1, Accounting; Phase 2- FP&A; Phase 3- Human Resources and Payroll, pending final scope approval.

All other terms and conditions of the RFP remain unchanged.

As a reminder, proposals are due by **2:00 PM PST on Tuesday, 9/8/2026.**

Best regards,

Procurement Team

Health Plan of San Joaquin and Mountain Valley Health Plan