



STATE OF INDIANA

Request for Information
RFI 25-002

Office of Indiana State Comptroller

For:

Automating the State of Indiana's Supplier/Vendor Onboarding and
Maintenance Solution

Response Due Date:

September 15, 2025 at 3:00PM Eastern Time

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REQUEST FOR INFORMATION 25-002

I. INTRODUCTION

This is a Request for Information (RFI) issued by the Indiana State Comptroller's Office (Comptroller) for a solution to automate and streamline the manual supplier onboarding and maintenance process.

It is the intent of the Comptroller to solicit responses to this RFI in accordance with the specifications contained in this document and associated attachments. Neither this RFI nor any response (proposal) submitted hereto is to be construed as a legal offer to enter a contract.

II. NON-DISCLOSURE

Certain information about the Comptroller's current Accounts Payable supplier onboarding and maintenance process is sensitive. As a result **Attachment A – Non-Disclosure Agreement** must be completed and emailed to RFI25-002@comptroller.in.gov. Upon receipt of a completed Agreement, respondents will receive **Attachment B1 – Supplier Management Process Diagrams** and **Attachment B2 – Supplier Management Process Detail** for reference. Attachments B1 and B2 provide detailed information regarding the State's current processes.

III. BACKGROUND AND OBJECTIVE

The Comptroller is responsible for the maintenance of the State of Indiana's supplier file in the State's Financial Enterprise resource planning (ERP) software, Oracle PeopleSoft Financials 9.2, Image 47 (PeopleSoft). Supplier maintenance includes establishing and maintaining supplier records, such as payments and 1099 tax status for every supplier doing business with the State, as well as every entity receiving state services, tax distributions and grant awards.

The Federal W-9 form is included as **Attachment F – Federal W-9**. The direct deposit form is included as **Attachment G – Automated Direct Deposit Authorization Agreement**. **Attachment H – Request for Waiver of Direct Deposit Requirement** is included in the event a supplier is unable to receive direct deposit payments. The comprehensive list of Comptroller AP Forms is available at <https://www.in.gov/comptroller/forms/>.

The Comptroller is interested in obtaining proposals for a solution to fully automate the existing onboarding and maintenance process to the State's ERP. The solution should have controls to prevent fraud, streamline supplier onboarding, enhance data accuracy, support compliance requirements and improve overall efficiency in maintaining supplier information. We are particularly interested in solutions that integrate seamlessly with ERP systems, minimize system management overhead, provide advanced reporting capabilities and ensure a secure and user-friendly experience for all stakeholders. Vendors are invited to respond with detailed information on their product offerings, implementation approach and support services.

External suppliers do not have access to directly manage their information, including name, address, phone number, contact email address(es) and banking information. The Comptroller's processes for new supplier setups and changes for supplier name, address, banking and email address changes are included in **Attachment B1 – Supplier Management Process Diagrams** with detail of each process in **Attachment B2 – Supplier Management Process Detail**.

As of July 2025, the Comptroller manages:

Total number of suppliers in system	394,144
Total number of active suppliers in system	79,391
Total number of new suppliers each of last 3 fiscal years	FY 23: 11,216 FY 24: 10,205 FY 25: 8,374
Total number of supplier inactivations each of last 3 fiscal years *FY 25 – Supplier Inactivation Process restarted.	FY 23: 409 FY 24: 526 FY 25: 31,298*
Average number of supplier updates performed per month	FY 23: 974 FY 24: 1587 FY 25: 1115
Total number of international vendors	Active: 73 Inactive: 392

IV. REQUIREMENTS

Respondent is required to indicate if each requirement can be met with the proposed solution by indicating yes/no. If the requirement cannot be met by the proposed solution, respondent should provide supporting detail explaining why the requirement cannot be met. A solution should at the minimum:

1. Offer an interface to collect and maintain required information to receive ACH payments from the State of Indiana. This includes but may not be limited to: W-9 form, ACH banking information or ACH waiver, and supplier tax setup.
2. Provide authentication to ensure source is trusted.
 - a. Multi-factor authentication and state-required security methods and protocols to be enforced if solution system includes usernames and passwords.
 - b. Identity verification may be incorporated into the process through other means if username/password/MFA are not required.
3. Verify submissions include all required data fields. Incomplete data fields are not acceptable.
4. Ability of Comptroller to review and approve or deny data submission before being processed into State Financial ERP.
5. Ability for approved data to be automatically or semi-automatically loaded into the State's Financial ERP to eliminate manual data entry, including the ability to identify and load unique set ups for different types of suppliers.
6. If forms are required in the proposed solution, ability for digital version of the form and its data to be automatically stored on the supplier record in the State's Financial ERP for history and tracking.
7. Ability of State's Financial ERP to track history of all updates, including storing documentation on supplier record in the State's ERP.
8. Automatic or bulk IRS TIN matching of supplier information.

9. Ability to automatically interface with federal foreign registry lists (for example, Office of Foreign Assets Control) to validate the legal ability to do business with a supplier.
10. Ability to perform banking validation and flag unsuccessful account validations for further manual review.
11. Establish supplier tax setup (as it would be reflected on a W-9) into State's Financial ERP or at minimum collect tax setup information in a more streamlined way for Comptroller review.
12. Demonstrate adherence to industry standard security and fraud prevention controls.

Please provide any additional information the solution may offer that is not included in the points listed above.

V. RESPONSE FORMAT AND ATTACHMENTS

Respondents should submit responses to this RFI that describe their proposed solutions. All narrative responses must be provided to the State in Microsoft Word or PDF format. Respondents should structure their responses according to the numbered sections outlined below to facilitate the State's review. Providing clear, detailed responses to these items will ensure a thorough evaluation of the solution's fit to the State's needs.

Response Instructions: Please respond to all the following requests in a Word or PDF document following the order shown below. Supplemental documents may be included as attachments if clearly identified and referenced.	
1	System Description <ol style="list-style-type: none"> a. Respondent shall provide a high-level description of the proposed solution and how it can meet the needs described in this RFI.
2	Core Functionalities <ol style="list-style-type: none"> a. Respondent shall describe in detail the accounts payable supplier proposed solution, including all relevant interface and process information.
3	Supplier Onboarding & Maintenance <ol style="list-style-type: none"> a. Respondent shall describe the process and tools for: <ol style="list-style-type: none"> 1. Supplier onboarding 2. Holding incomplete data submissions 3. Data validation 4. Supplier records maintenance, including the option to review and approve updates prior to completing updates
4	Integration Capabilities <ol style="list-style-type: none"> a. Respondent shall describe the ability of the proposed solution to integrate or interface with the State's Financial ERP. b. If the proposed solution requires customization, respondent shall describe the effort required.
5	Workflow Automation <ol style="list-style-type: none"> a. Respondent shall describe available workflow functionality such as the ability to configure workflows for supplier information approvals, exception handling and escalations, with opportunity for Comptroller approvals prior to making updates.

6	Supplier Information Submission Methods <ul style="list-style-type: none"> a. Respondent shall describe all available information submission formats, such as electronic, paper, email, PDF forms, etc.
7	Fraud Prevention <ul style="list-style-type: none"> a. Respondent shall explain all available fraud prevention and detection capabilities of the proposed solution to prevent unauthorized and unverified updates.
8	Security Measures & Data Handling <ul style="list-style-type: none"> a. Respondent shall describe relevant security measures for data encryption, fraud detection and user access control. b. Respondent shall specify data storage location. c. Respondent shall specify how data will be secured. d. Respondent shall explain any policies regarding communication and resolution of security breaches. e. Respondent shall explain their policy for retention and destruction of data files. f. Describe Respondent's and/or State's liability if there was a breach of security or incident of fraud.
9	Supplier Self-Service <ul style="list-style-type: none"> a. Respondent shall describe the ability of the proposed solution for suppliers to self-manage profiles, submit updates and receive update confirmations. b. Respondent shall describe the expected level of State support and management of security to manage supplier logins.
10	User Experience (UX) <ul style="list-style-type: none"> a. Respondent shall describe the user experience, including interface design and user-friendly navigation.
11	Infrastructure Requirements <ul style="list-style-type: none"> a. Respondent shall detail all required infrastructure to support the proposed solution such as servers, networking equipment, websites and data storage.
12	Scalability <ul style="list-style-type: none"> a. Respondent shall describe how the proposed solution adapts to future growth & changing business environments. b. Respondent shall describe how the proposed solution adapts to the potential migration to a new ERP provider and technological advancements.
13	Mobile Access <ul style="list-style-type: none"> a. Respondent shall describe the availability of the proposed solution via mobile devices.
14	Implementation Timeline & Process <ul style="list-style-type: none"> a. Respondent shall describe the implementation process, including: <ul style="list-style-type: none"> 1. An estimate of implementation duration 2. Implementation phases 3. Key milestones b. The description should include design work, testing and any other associated services. c. Describe the required full-time staff resources and time commitment needed for each implementation phase.
15	Key Personnel & Communication

	<ul style="list-style-type: none"> a. Respondent shall identify any key respondent personnel involved in the proposed solution and describe their role in the process. b. Respondent shall identify any key State personnel involved in implementing the proposed solution and describe their role in the process. c. Respondent must explain the channels of communication between the Comptroller and the respondent's personnel (i.e. any implementation contacts, testing contacts, project managers, etc.).
16	Training & Support <ul style="list-style-type: none"> a. Respondent shall explain available onboarding training, user guides and ongoing support options for all applicable parties involved in the process (including, but not limited to, the agencies, the Comptroller's Office, and suppliers).
17	Customization & Configuration <ul style="list-style-type: none"> a. Respondent shall explain available options for tailoring workflows, fields and reports to fit business needs, including the level of effort and responsible party.
18	Reporting & Analytics <ul style="list-style-type: none"> a. Respondent shall describe available dashboards, customizable reporting features and Key Performance Indicators, such as system uptime, response time and throughput guarantees.
19	Respondent Experience & References <ul style="list-style-type: none"> a. Respondent shall provide at least three client references from other states or similarly-scoped clients currently using their solution. Client references provided should include: <ul style="list-style-type: none"> 1. Client company name 2. Contact name & title 3. Client location 4. Description of work performed for the client and how it relates/scales to work requested in this RFI for the State of Indiana
20	Cost Structure <ul style="list-style-type: none"> a. Respondent shall specify all one-time and/or recurring costs of the proposed solutions, including but not limited to, upfront costs, recurring costs, integration fees, hidden/additional costs, cost savings, compliance and security costs, overage fees and annual fee increases, in Attachment – C Cost Proposal. b. Respondent shall explicitly list and describe all cost assumptions, conditions and/or constraints relative to, or which impact, the costs of the proposed solution.
21	Data Migration Support <ul style="list-style-type: none"> a. Respondent shall explain the level of assistance available for migration of existing supplier data into the new system (if applicable).
22	Regulatory Certifications <ul style="list-style-type: none"> a. Respondent shall explain adherence to applicable regulatory certifications such as FedRAMP, GovRAMP, SOC 2, ISO 27001 or other compliance standards with special consideration to data security and integrity.
23	StateRAMP (GovRAMP) <ul style="list-style-type: none"> a. Respondent shall explicitly describe their ability to comply with State of Indiana Executive Order 25-19, Implementation of StateRAMP, found at https://www.in.gov/gov/files/EO-25-19.pdf. Respondent shall demonstrate independently verified compliance with NIST 800-53, Revision 5, or the current

	version. If not currently compliant, respondent shall explain the plan to become compliant in accordance with section 5b of the executive order.
24	Compliance & Regulatory Support <ol style="list-style-type: none"> a. Respondent shall demonstrate adherence to tax regulations, audit requirements and data privacy laws.
25	Disaster Recovery & Business Continuity <ol style="list-style-type: none"> a. Respondent shall describe: <ol style="list-style-type: none"> 1. Disaster recovery processes 2. System downtime requirements 3. Data backups 4. Recovery protocols 5. Customer notification process
26	Innovation & Roadmap <ol style="list-style-type: none"> a. Respondent shall demonstrate a forward-looking approach, including technological advancements, process improvements and strategic enhancements to support long-term objectives. b. Respondent shall explain how product roadmap aligns with evolving customer needs, client feedback and industry demand.
27	Contract Terms <ol style="list-style-type: none"> a. Respondent shall explicitly describe any inability to agree to the State's boilerplate/contract terms (included as Attachment D – Sample State Contract Form). b. Respondent shall describe their ability and willingness to register with the Indiana Secretary of State (IN BIZ Business Registry) and the Indiana Department of Administration (Bidder Registry).
28	Other Considerations <ol style="list-style-type: none"> a. Describe the potential to offer the solution to other governmental entities within the State of Indiana. Other "governmental entities" are defined as: An agency, board, a branch, a bureau, a commission, a council, a department, an institution, an office, or another establishment of any of the following: (1) The judicial branch (2) The legislative branch (3) A political subdivision (includes towns, cities, local governments, etc.) (4) A State educational institution.

VI. RFI TIMELINE

The following timeline is only an illustration of this RFI process. The dates associated with each step are not to be considered binding.

Anticipated RFI Dates:

Activity	Date
Issuance of RFI	August 4, 2025
Virtual pre-proposal conference (1:00PM Eastern Time) (attendance highly encouraged)	August 11, 2025
Deadline to submit written questions (3:00PM Eastern Time)	August 18, 2025

Response to Written or Pre-proposal conference questions/RFI Amendments (3:00PM Eastern Time)	September 2, 2025
Due Date for Submissions (3:00PM Eastern Time)	September 15, 2025

VII. QUESTION / INQUIRY PROCESS

All questions/inquiries regarding RFI 25-002 must be submitted in writing via email using **Attachment E – Questions and Answers Template**, by the deadline of **August 18, 2025 by 3:00PM Eastern Time** to RFI25-002@comptroller.in.gov. The email subject line should contain the following phrase:

“REQUEST FOR INFORMATION 25-002, QUESTIONS AND INQUIRIES.”

Following the question/inquiry due date, the Comptroller will compile a list of the questions/inquiries submitted by all respondents. The compiled responses will be posted to the Comptroller’s website by the date listed in section VI. Only answers in the Comptroller’s written response will be considered official and valid by the State. No respondent shall rely upon, take any action or make any decision based upon any verbal communication with any State employee.

Please note that inquiries must only be directed to the Comptroller’s single point of contact for this RFI which is RFI25-002@comptroller.in.gov. **Inquiries are not to be directed at any other staff member of the Comptroller.** Such action may disqualify respondents from further consideration in this RFI.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be posted on the Comptroller external website.

VIII. PRE-PROPOSAL CONFERENCE

A pre-proposal conference will be held virtually via Teams on August 11, 2025 at 1:00PM ET. This is an opportunity for potential respondents to ask questions about the RFI process and get answers in real time. Due to the sensitive nature of Comptroller business processes, all attendees must have a completed **Attachment A – Non-Disclosure Agreement** on file. Questions pertaining to the solution should be submitted in writing for the Comptroller to answer in writing and post to the website for all respondents to view. If any answers are considered sensitive information, the answers will only be released to respondents with a completed **Attachment A – Non-Disclosure Agreement** on file. Please email RFI25-002@comptroller.in.gov to request a link to the pre-proposal conference no less than one hour before the session.

IX. CLARIFICATIONS AND DISCUSSIONS

The Comptroller reserves the right to request clarifications on information submitted to the Comptroller. The Comptroller also reserves the right to conduct discussions, either oral or written, with the respondents. These discussions could include requests for additional information, such as requests for cost or technical details and similar operational matters. The Comptroller will provide equivalent information to all respondents chosen for discussions.

X. CONFIDENTIALITY

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 et seq., and, after award, the entire solicitation file may be viewed and copied by any member of the public, including news agencies and competitors.

Please note citing “**Confidential**” on an entire section is not sufficient. The Public Access Counselor (PAC) provides guidance on APRA. Respondents are encouraged to read guidance from the PAC on this topic.

Respondents claiming a statutory exception to the APRA must indicate so on a separate attachment labeled “**Confidential Documentation Listing**”. That document should include the following information:

- List of all documents in which a statutory exemption to the APRA is claimed
- Specification of which statutory exception of APRA applies to each document
- Explanation of the manner in which the statutory exception to the APRA applies for each document

When claiming confidential information, respondents should submit two versions of their response:

- 1) A confidential version (for the State’s review and evaluation)
 - a. Confidential Information must be clearly marked in a separate folder.
- 2) A redacted version (for public records requests)

Prices are **NOT** confidential information.

XI. EVALUATION CRITERIA

RFI submissions will be evaluated by the Comptroller, and the Comptroller may award a contract(s) directly based on responses to this RFI. The Comptroller may request additional information. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name (total maximum points = 100).

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Requirements	Yes/No
2. Ability of the proposed solution to meet business needs	80 points
3. Pricing (Cost Proposal)	20 points

Step 1

In this step, proposals will be evaluated only against Criteria 1 to ensure that they adhere to requirements, including providing answers to all evaluation questions in Section V. Any proposals not meeting the requirements, or providing an acceptable alternative, will be disqualified.

Step 2

The proposals that meet the requirements will then be scored based on Criteria 2 and 3 **only**. This scoring will have a maximum possible score of 100 points. All proposals will be ranked on their combined scores for Criteria 2 and 3 **only**. This ranking may be used to create a list of finalists. Any proposal not included in this list of finalists will not be considered for any further evaluation.

Step 2 may include one or more rounds of proposal discussions (oral and/or written) focused on cost and other proposal elements.

Step 3

If the Comptroller conducts additional rounds of discussions and a target pricing and/or best and final offer ("BAFO") round which lead to changes in either the technical or cost proposal for the short-listed Respondents, their scores will be recomputed.

The section below describes the different evaluation criteria.

Adherence to Requirements – Yes/No

Respondents passing this category move to Step 2 and proposals are evaluated for Management Assessment/Quality and Cost. Respondents will answer yes/no to requirements and have the opportunity to explain their answer to each requirement. Answering "No" does not automatically equate to being disqualified.

Ability of the proposed solution to meet business needs - 80 points

Proposals will be evaluated for overall ability of the proposed solution to meet business needs.

Pricing – 20 points

Cost scores will then be normalized to one another based on the lowest total cost evaluated. The lowest average unit rate receives a total of 20 points. The normalization formula is as follows:

- Respondent's Cost Score = (Lowest Total Cost / Total Cost of Proposal) X 20

The Comptroller or their designee will, in the exercise of their sole discretion, determine which proposal(s) offer the best means of servicing the interests of the State. The exercise of this discretion will be final.

XII. RESPONSE SUBMISSION INSTRUCTIONS

Vendors interested in providing a proposal to the Comptroller should submit responses via email to RFI25-002@comptroller.in.gov no later than **September 15, 2025 by 3:00PM Eastern Time**. Any information received after the due date and time may not be considered. No other method of submission will be accepted.

No more than one proposal per Respondent may be submitted.

Templates outlined in this document should be returned in their original file format.

The Comptroller accepts no obligations for costs incurred by Respondents in response to this RFI.