**Instructions:** All Proposers must respond to the following questions by restating the identifying number of each question (for example, 6A.01), restating each question or statement, and providing a detailed written response. The Proposal, at a minimum, must address the items listed below, and be organized in the order indicated below. Do not include cost/pricing information in this section of the Proposal. Costs must only be in Appendix 13 – Cost Proposal.

6A.01 What way does the system’s structure ensure that all functionality works seamlessly together and avoids data redundancy and synchronization issues?

6A.02 What do you see as your competitive advantage? Why would the Department's users like using your system? Why does your solution provide the best fit for the Department, based on our requirements, and what are the things that differentiate your system from other PAS solutions?

6A.03 How does your company improve and advance your PAS products on an ongoing basis?

6A.04 Describe how you handle a pension system with 1500 employers. For example, ETF cannot allow one employer to see or access another employer’s data. Include in your response:

* 1. What is the largest number of employers your PAS has been configured for?
  2. What challenges have you seen with configuring the system for over 1000 employers?
  3. How do you manage the integration of a large number of employers into a new system and make sure their administrative screens are visible to the correct individuals at ETF but not visible to each other?

6A.05 ETF offers a Sick Leave Credit Conversion Program that allows certain WRS participants to convert unused sick leave to credits that can be used to pay health insurance premiums through ETF as a retiree. This program is currently administered with a custom application referred to as AcSL and contains both multiple related sub-programs and many qualifiers and business rules based on employment history and job categories. ETF is also responsible for providing data from this system for actuarial purposes. To be considered for an award, you at least need to commit to one of the following: manual integration with ETF’s legacy AcSL application, automated integration with AcSL, or full replacement of AcSL. All approaches include some mechanism of integrating with ETF’s health insurance premium payment systems. ETF prefers replacement of or direct integration with AcSL.

Does your system include functionality allowing alternative credit programs to pay for retiree

benefits, including administering the program and its business rules, tracking sick leave credit

balances over the life of a member's work and retirement history, and supporting member

communications? If not, can you creatively leverage any of your system's existing capabilities to help meet this need? Please describe your solution’s already existing core features that could be adapted to manage all or some components of the sick leave program. Additional information on the program can be found on ETF's public web site: <https://etf.wi.gov/resource/sick-leave-credit-conversion-program-brochure>.

Please minimally describe functionality to:

* Manage eligibility rules and workflows required for system implementation, including

conversion processes from accumulated sick leave to sick leave credits. Calculate the sick leave credit amount based on information from employers.

* + Online portal for employer reporting
* Track and decrement sick leave credits as they are applied towards health insurance

payments, and otherwise support the transition to other payment sources like annuity

deductions. Track account balances per member including deductions and refunds

* + Transfer and track balances for eligible surviving dependents including deductions and refunds
* Track balances and deductions for both sick leave programs (ASLCC and SHICC)
  + Keep both ledgers for accounting purposes and have export reporting capabilities for accounting purposes
* Integrate with ETF health premium payment source management systems. Accept incoming and create outgoing health insurance payroll information (able to take ingests)
* Support data extracts for actuarial purposes. Generate reports and export for auditing, financial, and business operations.
* Indicate the account status (for example, if the member’s account escrowed)
* Support member communications on sick leave availability, usage, and transitions after credit depletion. Generate communications to members concerning account balances.
  + Able to manually edit and/or override communications
* Track change history for auditing purposes

6A.06 What is fundamental to the architecture that can NOT be changed vs. what is configurable? Where and what types of customizations cause challenges to long term management and upgrade of system components due to conflicts with this foundational architecture? Please provide examples.

6A.07 Describe the solutions built into the proposed system to mitigate the risks of:

A. Producing inaccurate benefit calculations, adjustments/recalculations, and payments to retirees and/or deceased members due to manual processing errors, and tasks executed outside of the system.

B. Benefit overpayments due to maximum benefit restricted pursuant to state law.

C. Benefit processing delays including delays due to retiree not being notified by ETF of incomplete, unverified, or inaccurate application information.

D. Benefit processing delays due to complex rules required to calculate average final earnings, years of service, and any special considerations.

E. Data integrity issues including inaccurate data being entered either via automated processes, manual entry, and/or manual upload.

F. Not identifying accurate benefits paid to retirees who subsequently returned to work.

G. Ineligible and duplicate termination refunds from being submitted or processed.

H. Payment resumption of a suspended benefit prematurely.

6A.08 Indicate any additional functionality not included in the requirements or your responses to essay questions that you would like ETF to know about.

6A.09 Describe how the proposed PAS solution has transformed work processes. Include a description of how the solution can use multiple methods such as case management, first in first out, and other balanced assignment methods.

**Before responding to questions 6A.10 – 6A.29, for each topical area, review the User Story Requirements and System Requirements in Appendix 6B – Functional Requirements.**

6A.10 Please provide a 2-page narrative description of how your solution supports the **Benefit Calculation** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.11 Please provide a 2-page narrative description of how your solution supports the **Variable Election** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.12 Please provide a 2-page narrative description of how your solution supports the **Disability** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.13 Please provide a 2-page narrative description of how your solution supports the **Reciprocity** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.14 Please provide a 2-page narrative description of how your solution supports the **Qualified Domestic Relations Order (QDRO)** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.15 Please provide a 2-page narrative description of how your solution supports the **Member Enrollment** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.16 Please provide a 2-page narrative description of how your solution supports the **Benefit Estimate** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.17 Please provide a 2-page narrative description of how your solution supports the **Actuarial Valuation** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.18 Please provide a 2-page narrative description of how your solution supports the **Tax Reporting and RMD** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.19 Please provide a 2-page narrative description of how your solution supports the **Employer Reporting** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.20 Please provide a 2-page narrative description of how your solution supports the **Service Purchase** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.21 Please provide a 2-page narrative description of how your solution supports the **Deferred Compensation** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.22 Please provide a 2-page narrative description of how your solution supports the **Death Benefits** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.23 Please provide a 2-page narrative description of how your solution supports the **Coordination of Benefits** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.24 Please provide a 2-page narrative description of how your solution supports the **Employer Set-up & Enrollment** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.25 Please provide a 2-page narrative description of how your solution supports the **Annual Member** processes and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.26 Please provide a 2-page narrative description of how your solution supports the **Member Data** **Maintenance** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.27 Please provide a 2-page narrative description of how your solution supports the **Service Retirement** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.28 Please provide a 2-page narrative description of how your solution supports the **General Ledger** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.

6A.29 Please provide a 2-page narrative description of how your solution supports the **Retiree Benefit Payroll** process and meets the functional features and requirements listed. Provide information detailing what differentiates your solution from others in the industry and why it is the best option for ETF.