|  |  |  |
| --- | --- | --- |
| ETF_logo_large | **STATE OF WISCONSIN**  **Department of Employee Trust Funds**  **A. John Voelker**  SECRETARY | 4822 Madison Yards Way  Madison, WI 53705-9100  P. O. Box 7931  Madison, WI 53707-7931  http://etf.wi.gov |

Date: November 7, 2024

To: All Potential Proposers to RFP ETE0061

RE: Addendum No. 5 to Request for Proposals (RFP) ETE0061

Pension Administration System

BOX url change for proposal upload

Vendor Clarification Questions and Department Answers

This Addendum is available on ETF’s web site at <https://etf.wi.gov/node/37111>

**Acknowledgement of receipt of this Addendum No. 5:**

**Proposers should acknowledge receipt of this Addendum No. 5 by providing the information in the table below and including this Page 1 with their Proposal cover letter.**

|  |  |
| --- | --- |
| Company Name: |  |
| Authorized Person (Printed/Typed Name and Title): |  |
| Date: |  |

1. Delete from RFP ETE0061 Section 1.10 Table 5 – Calendar of Events\* the originally provided Box url.

Add to RFP ETE0061 Section 1.10 Table 5 – Calendar of Events” the following Box url:

Only use this BOX url to upload proposals before 11:00 AM CST on November 18, 2024:o

<https://etf.app.box.com/f/d85b2ffeb50842b6a89b37ab47adba92>

1. The following clarification questions from Proposers and answers from the Department are hereby added to RFP ETE0061:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Q # | RFP Section /Appendix # | RFP Page | Question/Rationale | Department Answer |
| Q1 | Appendix 7D – Data Migration Catalog | 1 | Do the ceding systems hold member / employer documents / images or are these held separately? Will historic and active documents / images need to be migrated and what format(s) are these held in? How many documents / images would have to be migrated?  **Follow up CQ:**  We understand that ETFs current legacy PAS holds documents, and these will not be migrated to the new PAS, but instead migrated to an existing document management system. And as a result, a solution will be needed to access these documents from the new PAS.  However, is that solely for historic documentation, with any new documents produced and stored within the new PAS, or is there an expectation that any new documents produced from processes in the new PAS will need to be added to ETFs document management system?  If so, is there any expectation of how documents would be added to the document management system i.e. periodically uploaded from PAS to the document management system or via an interface? Please can you provide further details of the document management system name and underlying technology? | ETF’s current legacy systems hold documents, but the documents will not need to be migrated into the PAS as they will be migrated into a document management system ETF manages. ETF will work with the selected vendor to determine how those documents could be accessed through the PAS.  Documents that are produced by the PAS or uploaded into the PAS after implementation will need to be sent to ETF’s internal document management system (which is Hyland OnBase) through an API. Ideally this will be a real-time interface but minimally will need to be done on a daily basis. |
| Q2 | Appendix 13 – Cost Proposal | Tab 4 – Extension & Optional Costs | The instructions in the table state that this table should include services that exist in the marketplace and are scoped in the ETF's PAS RFP but are 3rd party bolt-ons. We would like to double-check that this instruction is correct as elements of our scoped solution could be deemed 3rd party bolt-on and, if included in this table rather than the Total Cost of our PAS solution under Tab 3, would therefore result in a reduction of the Total Cost of our PAS solution under Tab 3. | If the 3rd party bolt-on is not part of the core PAS offered by a vendor, and would be purchased separately or charged to ETF separately, please list it on Tab 4.  If the 3rd party bolt-on is a core part of the PAS, and the PAS would be incomplete or unusable without it, and it is included in the base cost of the PAS, then it should not be listed in Tab 4.  No matter how you include any 3rd party bolt on cost in the Cost Proposal, all subcontractors including subsidiaries need to be listed in Appendix 3 – Subcontractor Information, along with proposal authors. |

**END**