

001 – General Technical Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	The PAS solution must be a COTS solution.		
2	The PAS COTS solution should have the ability for the MWRDRF to receive updated versions of the released version to help improve the software/solution that was implemented for the MWRDRF.		
3	Bidder shall provide the hosting solution, which includes, but is not limited to, purchasing, installing, configuring, and maintaining all hardware and software.		
4	Shall have hosting that supports Business Continuity and Disaster Recovery (BCDR) for the solution.		
5	Shall have hosting at redundant sites to support BCDR.		
6	Shall have hosting that constantly monitors data to analyze any discrepancies or anticipate malicious activity.		
7	Shall provide the capability to store all MWRDRF pension administration data assuming a 10% membership growth per year.		
8	Shall be a browser-based solution independent of browser utilized (e.g., Chrome, Internet Explorer, Edge, Safari, Firefox, and Opera) and not require the use of plug-ins.		
9	The PAS solution shall have a 360 view for all persons independently of their status.		
10	Shall provide the ability to support the current release and previous releases of Microsoft IE/Edge/Chrome/Firefox, Safari.		
11	Shall support the latest version of the World Wide Web Consortium’s Web Content Accessibility Guidelines for information presented via the web.		
12	Shall have all software installed, operational, and customized to MWRDRF configuration prior to using the software for any development or production activities.		
13	Shall provide the ability for a user to access authorized services through a single sign-on capability for the PAS solution.		
14	Shall provide an average response time for all online processes of less than three (3) seconds. The Bidder shall specify the processes where this guarantee cannot be met. For the identified processes, the Bidder shall identify any trade-offs for those processes among performance, usability, and the proposed solution, and then work with MWRDRF to define alternatives that are mutually acceptable.		
15	Shall provide a performance level that supports concurrent usage by a minimum of 15 MWRDRF employees, the Plan Sponsor, and 5,000 external users.		
16	Shall provide the ability for MWRDRF staff to work remotely through a web application or Software as a Service (SaaS).		
002 – Security Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall allow user access to the WSS screen through a secure log-in (including survivors, alternate payees).		
2	Shall require multi-factor authentication upon logging in to WSS (two-step authentication).		
3	Shall allow the ability to access functionality through secure web services or API.		
4	Shall use the secure TCP/IP transport protocol (https://).		

5	Shall utilize IP security extension (TLS or IPSec) where applicable.		
6	Shall ensure the security, confidentiality, integrity, and availability of member and participant information is in accordance with all applicable laws and regulations, both state and federal, including any Board Rules.		
7	Shall apply the same security policies, procedures, and practices across all application environments (e.g., production, test).		
8	Shall establish and set up the appropriate security level and access permissions for each user on the system based on information provided by MWRDRF.		
9	Shall require the user to log in again if they are inactive for x (parameter) period of time.		
10	Shall at a minimum adhere to state or MWRDRF standards for encryption technology for external communications across the Internet.		
11	Shall avoid unnecessary redundant storage of personally identifiable information.		
12	Shall have the ability to send a notification to the member when sensitive changes occur (e.g., change of address, direct deposit updates, distributions)		
003 – Web Self-Service (WSS) Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall provide requested self-service functionality on the MWRDRF website.		
2	Shall integrate with and provide the same look and feel with the MWRDRF (home) website.		
3	Shall adhere to all state standards for the website.		
4	Shall provide the ability to view and submit beneficiary information changes (e.g., active, annuitant).		
5	Shall automatically generate an updated beneficiary notification to the member’s preferred communication method when the beneficiary information has changed.		
6	Shall provide the ability to display the retirement, refund, and service purchase checklist from the line of business so the member can see where they are in the process.		
7	Shall provide the ability to survey members and conduct elections. Shall have the ability to provide the results to MWRDRF “blindly.”		
8	Shall distribute new hire (enrollment-related) forms (e.g., welcome letter, information sheet, beneficiary nomination) initiated via request by workflow or web.		
9	Shall provide a benefit estimate calculator to assist members with estimating their pension amount.		
10	Shall provide the ability for a member to save and name their benefit estimate.		
11	Shall provide a benefit estimate functionality as defined with the line of business application for the member, including notifications based on a tier such as a service credit that can be purchased or the account is in a status (e.g., inactive, refunded, retired, concurrent, data migration error).		
12	Shall provide the ability to view previous calculated benefit estimates.		
13	Shall generate an estimate letter that can be printed.		
14	Shall pull a user's data to populate their benefit estimate, address, or other fields that are on the self-service screens.		

15	Shall provide the ability to view and print benefit summary information (retired and active).		
16	Shall display certain forms based on the user status (e.g., active, retired, inactive).		
17	Shall have the ability to print both blank and pre-filled forms.		
18	Shall provide the ability for the user to print or request MWRDRF to send them a form, benefit estimate, or annual statement.		
19	Shall have the ability to track requests that require the MWRDRF's response and the method for responding (e.g., call, letter, e-mail).		
20	Shall provide the member the ability to view and print previous statements.		
21	Shall provide the member the ability to view and print their account balance.		
22	Shall provide the member the ability to view and print contribution history information and employment histories.		
23	Shall provide the user the ability to view and print 1099Rs.		
24	Shall provide the ability to update demographic information for annuitants and inactive participants.		
25	Shall display informational messages to the member of the current eligibility (e.g., vested, refunded, retired, survivor).		
26	Shall provide the ability to post messages to all users based on status.		
27	Shall provide the ability for the MWRDRF to enter the time their staff is available, and otherwise no time available will be put on the web calendar for meetings or sessions.		
28	WSS calendar shall be able to integrate with MS Outlook 365.		
29	Shall integrate calendar activities with Outlook and automatically link to the contacts.		
30	Shall provide the ability for WSS users/MWRDRF staff to schedule or cancel counseling activities, seminars, or workshops, or to sign up for meetings through a calendar type of view.		
31	Shall have the ability to generate an appointment reminder notification informing the member about an upcoming meeting they have registered for based on the member's preferred method of communication.		
32	Shall provide the ability for any payment recipient to view any of their payments and payment details.		
33	Shall capture a request for a refund through a WSS utility that applies appropriate edits to the request and will not allow the submission of an incomplete or inaccurate request.		
34	Shall capture a request for a retirement application through a WSS utility that applies appropriate edits to the request and will not allow the submission of an incomplete or inaccurate request.		
35	Shall check any refund request to see if they are within x (parameter) number of months from retirement and display a message stating that they will be eligible for retirement benefits in x (parameter) number of months.		
36	Shall determine retirement eligibility of member requesting a refund and notify an MWRDRF user who would have the ability to send a system-generated letter.		

37	Shall capture a request for a purchase estimate through a WSS utility that applies appropriate edits to the request and will not allow the submission of an incomplete or inaccurate request.		
38	Shall allow access to additional forms if a signature form is on file.		
39	Shall provide the ability for MWRDRF to view the same screen and data being entered that the WSS user is seeing to help with questions.		
40	Shall provide an appropriate Frequently Asked Questions (FAQ) section for each WSS area (e.g., refunds, purchases, retirement).		
41	Shall provide the ability for MWRDRF to update the FAQ section without requiring programming changes.		
42	Shall provide the ability for the user to select to receive any check stub (payment advice) online.		
43	Shall provide the ability for the user to change their tax elections (e.g., state, federal).		
44	Shall provide the ability to calculate estimated beneficiary benefits based on the member's benefit estimate.		
45	Shall provide the ability to issue a reminder to the member that they are eligible to retire x (parameter) days from their normal (non-discounted) retirement eligibility.		
46	Shall provide a view that contains aggregate of the payroll records selected for the final average salary and the details of how the benefit estimate was calculated.		
47	Shall provide the ability for the member to see all their historical data in a summary view and a detailed view.		
48	Shall have the ability to notify the member through their preferred method of communication (e.g., mail, e-mail) of major changes made to their account (e.g., change of address online or internally).		
49	Shall provide the ability for the member to create and send a retirement application on WSS.		
50	Shall provide a wizard to assist members through the WSS features (e.g., retirement benefit application, disability application, service purchases).		
51	Shall provide the ability for the MWRDRF to view and download documentation on WSS.		
52	Shall automatically send a notification to a WSS user confirming that they updated their password.		
53	Shall automatically force the WSS user to change their password after parameters reached as defined by MWRDRF (e.g., lockouts, x days, parameters to be defined by the System).		
54	Shall provide the ability to verify the identity of the WSS user through a series of security questions and answers.		
55	Shall provide the ability for the user to reset or update their password.		
56	Shall automatically save a member's benefit estimate and allow it to be viewed by MWRDRF staff.		
57	Shall provide a printable statement of retirement income.		
58	Shall allow users to specify a short message service (SMS) number to use for notifications.		

59	Shall allow users to prefer e-mail, SMS, or both for notifications.		
60	Shall support the latest version of Chrome, Edge, Safari, and Firefox,		
61	Shall allow users to export any printable report or form to PDF.		
62	Shall provide the ability for the member to upload additional disability forms.		
63	Shall provide the ability for the member to upload birth certificates, marriage certificates, divorce decrees, or other documents necessary for validating benefit eligibility.		
64	Shall provide the ability to apply MWRDRF retention rules to WSS accounts and remove accounts.		
65	Shall provide the ability for MWRDRF staff to lock/unlock WSS accounts or activities.		
66	Shall have the ability for MWRDRF internal staff to see any saved information from the member service portal.		
67	Shall have the ability to track calls and interaction with staff.		
004 – Workflow Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall create automated workflow for current MWRDRF procedures and process (see Attachment 4 – MWRDRF Business Processes Workflows) or for the PAS vendor's system process(es) that is required to complete the same process.		
2	Shall propose a solution that integrates with an imaging software whereby workflows can be launched automatically based on document type.		
3	Shall be seamlessly integrated with the new PAS solution (i.e., bidirectional communication between PAS solution and workflow).		
4	Shall send and receive events and corresponding data to workflow from PAS solution.		
5	Shall receive and act upon events and corresponding data from workflow.		
6	Shall allow supervisors and/or staff with MWRDRF-defined permission levels to reassign work from one individual to another and one queue/work basket to another.		
7	Shall track start and end time of overall workflow processing and at different levels (e.g., process, subprocess, activity, step, wait, hold until time).		
8	Shall launch the appropriate PAS screen from a workflow step.		
9	Shall associate appropriate images to the workflow step, including documents received via WSS.		
10	Shall provide a view showing productivity and performance information (e.g., by staff member, transaction type, etc.).		
11	Shall provide the ability for MWRDRF users to modify workflow template without IT involvement.		
12	Shall be able to cancel a workflow without having to go through all the steps and close them out (e.g., abort the workflow).		
13	Shall launch workflows from the receipt of a document (e.g., form, letter, Microsoft Word/Excel document, e-mail).		
14	Shall provide the ability to administer the creation of notifications.		
15	Shall provide the ability to notify workflow user(s) based on workflow events (e.g., completion of a step, receipt of an associated document, timing) as defined by MWRDRF.		

16	Shall provide the ability to add specific wording to the template for each workflow step (e.g., instructions, questions to ask, etc.) without IT involvement.		
17	Shall provide a view of workflows showing the status of a workflow and its steps based on MWRDRF-defined parameters.		
18	Shall allow notes to be added and stored to workflow steps.		
19	Shall provide the ability to prioritize active workflows.		
20	Shall provide the ability to limit moving forward to the next step until all items are completed.		
21	Shall have the ability to override a step if all checklist items are not completed.		
005 – Bidder’s Methodology and Execution Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall provide a formal structured system development life cycle methodology (inception to post-production support).		
2	Shall provide MWRDRF with a mapping of each artifact to all Requirements that it satisfies (e.g., Requirements found in the RFP, proposal, and contract) before beginning work on that artifact.		
3	Shall provide a project schedule with key milestone dates within the first month of the contract.		
4	Shall make sure that the project schedule includes milestones for all proposed payment schedule deliverables.		
5	Shall provide a project schedule with detailed tasks with MWRDRF resources loaded no later than two (2) months after the project starts.		
6	Shall define what MWRDRF resource by role or skill set is needed for each task in the project schedule no later than two (2) months after the project starts.		
7	Shall provide a revised project schedule with key milestone dates whenever there is an approved change to a key milestone date of more than one week.		
8	Shall produce a bi-weekly dashboard status report to the MWRDRF that identifies.		
	Project Status by the following color indicators:		
	Green – on schedule, on budget		
	Yellow – potential delay to the schedule or cost increase		
	Red – behind schedule or cost overrun		
	Issues by the following color indicators:		
	Green – no issues or issue has been resolved.		
Yellow – issue requires MWRDRF or vendor action to prevent a negative project impact.			
Red – issue has occurred resulting in a negative project impact and will require an adjustment to the scope, schedule, or cost.			
9	Shall provide a formal structured Change Requests (e.g., scope, schedule, resources).		
10	Shall provide a formal structured Plan of Accomplishments:		
	a. achieved during the reporting period,		
	b. not achieved during the reporting period and,		
	c. next reporting period		

11	Shall, in the case of a phased approach, include in the project schedule a stabilization period for the length of each 90-day warranty period where the only work being performed will be warranty work (e.g., no requirement sessions, no design sessions).		
12	Shall develop a cut-over plan for MWRDRF (including in-flight business process and data migration, back-out plan, and contingency cut-over date) a minimum of 30 days prior to each release into production.		
006 – Testing Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall provide an overall comprehensive test plan that will contain individual detailed test plans for each type of test (including but not limited to unit, business function, process, performance, interface, integration, GL, security, user acceptance testing (UAT), regression, boundary, negative, test evaluation summaries, etc.).		
	a. Key elements that are required in each test plan include traceability back to a detailed requirement specification and the detailed requirement specification to a commitment.		
	b. Each test plan should define the test scenarios and test cases (or link to them if in a tool) and explain what results will be provided, such as the expected results and the actual test results (including screenshots).		
	c. Each test plan should explain what test metrics will be captured to show the number of test scenarios and test cases not executed, executed and passed, and executed and failed.		
2	Shall provide upon completion of testing for a type of test a test evaluation summary that should provide the expected results and test results (including screenshots) for the test scenarios and test cases (or link to them if in a tool) in the test plan.		
	a. Should provide the metrics captured to show the number of test scenarios and test cases not executed, executed and passed, and executed and failed.		
3	Shall provide a methodology for tracking defects that is accessible to MWRDRF staff and that can support a defect triage process to be defined and agreed upon by the vendor and MWRDRF staff.		
4	Shall conduct all business functions and user acceptance testing on MWRDRF converted data to verify compliance with the requirements.		
5	Shall conduct performance testing, which includes load testing, stress testing, and endurance testing, to verify that the solution meets MWRDRF criteria.		
6	Shall conduct interface testing to verify the solution meets the specifications or its external entities using MWRDRF-converted data where applicable.		
7	Shall conduct integration testing to verify the solution meets MWRDRF integration specifications using system-generated and MWRDRF-converted data.		
8	Shall develop and execute regression tests using system-generated and MWRDRF-converted data for each major and minor release using automated and manual scripts that will be provided with documentation to MWRDRF prior to user acceptance testing.		
9	Shall conduct security testing for all solution user types, including users with multiple roles, to validate the solution authentication and authorization processes.		
10	Shall conduct a third-party penetration test.		

11	Shall build a solution sand box for MWRDRF staff to use in order to become familiar with solution functionality and for ad hoc testing.		
12	Shall support MWRDRF staff in the building, operation, and problem determination of the solution application in all user acceptance testing scenarios.		
13	Shall include in the Project Plan a minimum of 20% of the overall project schedule for the execution of user acceptance testing.		
14	Shall perform end-to-end business process testing, including interfaces and integrations, using system-generated and MWRDRF-converted data utilizing the same user roles as in production.		
15	Shall support and participate in the testing and problem resolution for data conversion.		
16	Shall provide a stable release of the solution application that meets MWRDRF UAT entry specifications as defined in an agreed upon UAT test plan.		
17	Shall resolve all catastrophic and major problems encountered during UAT to a level that meets MWRDRF UAT exit criteria as defined in an agreed upon UAT test plan.		
18	Shall have the ability to maintain a sand box beyond the implementation phase for use of future updates.		
007 – End User Training, Documentation, and Support Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall provide complete training for all MWRDRF users preceding each release (e.g., production code deployment).		
2	Shall provide electronic documentation.		
3	Shall provide training documentation in a business process-oriented manner.		
4	Shall provide user manuals in a business process-oriented manner and update these manuals as the solution evolves.		
5	Shall provide all training at MWRDRF location(s) or virtually as agreed to by MWRDRF.		
6	Shall present all training material to MWRDRF at least 15 days prior to the training session for their review and approval prior to the start of any training.		
7	Shall provide end user support as part of the solution until all 90-day warranty defects have been fixed.		
8	Shall provide release notes and corresponding training and user manual documentation updates preceding each release into production.		
008 – Solution Warranty Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall provide a 90-day warranty period (see definition below) for defect (see definition below) identification for the PAS application after the functionality has been executed for the first time after the release of the functionality to production. This will apply to any quarterly or annual functionality that was not within the warranty period. All defects, regardless of severity or priority identified in the 90-day period shall be corrected under this 90-day warranty at the vendor's expense.		
2	Shall provide a one-year system warranty for critical defects (see definition below) for the PAS application to begin after initial warranty has completed as specified.		

3	Shall provide for a minimum PAS application uptime of 99.95% during core business hours for all major functions proposed, including web and local operations and excluding scheduled downtime or MWRDRF-initiated downtime. The Bidder shall specify how availability is measured and under what conditions this guarantee cannot be met.		
4	Shall provide for a PAS application uptime of 99.95% during non-core business hours for all major functions proposed, including web and local operations, and excluding scheduled downtime or MWRDRF-initiated downtime. The Bidder shall specify how availability is measured and under what conditions this guarantee cannot be met.		
009 – Post-Implementation Support Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall validate, that all software, including 3rd party software, are part of the solution being proposed and will be managed solely by your company.		
2	Shall provide a sample of the Post Implementation Agreement.		
010 – Hosting, Business Continuity, and Disaster Recovery Requirements		The bidder should describe how your base product will address these functions.	Part of base product (Yes/No)
1	Shall have hosting that supports Business Continuity and Disaster Recovery (BCDR) for the solution.		
2	Shall have a primary hosting site and a redundant site. Please specify the locations of the sites as part of their fixed bid proposal to support BCDR.		
3	Shall have hosting that constantly monitors data to analyze any discrepancies or anticipate malicious activity.		
4	Shall provide your services level agreements (SLAs) for the guaranteed hosting uptime.		
5	Shall describe your hosting database structure (e.g., single tenant database vs multi-tenant database).		
Confirm that the complete scope in Section 04 Scope, 030 Detailed Scope, p. 41 will be provided with your solution.			