Attachment C: Solution Demonstration Form

# Vendor details and Authorization

|  |  |
| --- | --- |
| Vendor Firm Name |  |
| Vendor Primary Contact Name |  |
| Vendor Primary Contact Email |  |
| Vendor Primary Contact Phone |  |

I hereby certify that I am an authorized representative of the firm listed above and confirm our intent to submit a response to the PAS RFP issued by BCERS.

Authorized Representative’s Signature:

Authorized Representative’s Name:

Authorized Representative’s Title:

Date:

# Demonstration Instructions

Unless otherwise communicated, BCERS plans to conduct same-day software demonstrations and interviews in a single session lasting up to three hours. The objective is to ensure that BCERS has the opportunity to ask all questions and see requested functionality demonstrated.

As part of the software demonstrations and interview, the following tasks / items shall be addressed by the Vendor:

1. Complete the vendor response table below, which includes demonstration scenarios and indicates the percentage of functionality demonstrated that is provided as standard functionality—meaning it works out-of-the-box (OOB), requires customization (CUST), or will be pre-configured by the vendor (PRE) using their prescribed method (with no input required from BCERS).
2. Vendor will be required to demonstrate software functionality as identified in the table below. Vendors may combine scenarios and follow a different order if all areas are covered by the software demonstration.
3. Overview of Vendor’s implementation approach as it pertains to phasing, staffing, allocation, timing, and delivery.
4. Technical question and answer session. Please also take a look at the technical questions in Attachment D – Section 4 in preparation for this session.

Any additional required details will be provided by BCERS in invitations to the vendors. A finalist vendor’s failure to agree to the demonstration and interview may result in disqualification.

The mandatory demonstration scenarios are identified in the vendor response table below. The table must be completed by the vendor and submitted to BCERS according to the instructions provided in Sections 6 and 8 of the main RFP documents.

The demonstrations scenarios and vendor response table are as follows:

# Demonstration Scenarios

| ID | Functional Area | Demonstration Scenario | Indicate % customized or OOB |
| --- | --- | --- | --- |
| 1a | Employer Data | Demonstrate Upload, Edit and Posting of payroll files:   * Add (New, Rehire), Change, Delete (Termination), & Wage Files including validation and exception processes process (i.e. generation of errors/warning and correction process). * of a wage/contribution file, including the file validation and exception process (i.e. generation of errors/warning and correction process). |  |
| 1b | Show a BCERS view of account balance, payment history, outstanding payments, and past due payments. |  |
| 1c | Demonstrate how the PAS handles new member enrollment and notification.   * Status Changes i.e. Active to Enrolled, terminated to (Re)Enrolled, etc. * Detailing of employee identifiers, pension numbers, plan type, contribution rates, and effective dates * Reports that will be transmitted to external entities (e.g., payroll or third-party administrators) to initiate pension deductions. * Transmission confirmations, posting logs, and audit reports are retained for reconciliation, compliance, and audit purposes. * System generated New Enrollment Letter sent via email/paper mail to members |  |
| 1d |  | Demonstrate System Ability to Calculate & produce report of Employee’s Missed or Incorrect Contributions under various parameters |  |
| 1e |  | Demonstrate Service Credit Rollup (Systematically) & Individual Employee Service Credit Corrections   * Periodic Service Roll-Ups & Corrected service time posted to the employee’s record reflected in benefit calculations, contributions, and reporting. * System generated audit logs and confirmation reports to ensure traceability, compliance, and reconciliation. |  |
| 1f |  | Demonstrate Recalculation of Individual Member Interest   * The system recalculates interest based on the corrected earnings, applicable interest rates, and defined plan rules (for review). * Users can review and approve recalculated interest before final posting to ensure accuracy and transparency. * Adjustment reports are generated to show original earnings, corrected earnings, and interest changes for each affected individual * System generated audit logs and confirmation reports to ensure traceability, compliance, and reconciliation |  |
| 1g |  | Demonstrate Testing Environment   * Used to identify, test, and resolve initial processing issues before moving to production |  |
| 2a | Core Admin | Demonstrate BCERS view and edit of wages and contributions, including an adjustment to a prior contribution period. |  |
| 2b | Demonstrate generation of a PAS letter and a form, and the ability to edit and save changes to the document template. |  |
| 2c | Demonstrate ability to generate a PAS report in different formats including PDF, Excel, Text, etc..  Also, include demonstration of ad hoc query and reporting tools. |  |
| 2d | Demonstrate PAS views of scanned/imaged documents and self-service uploaded documents from within a member account. Include view of audit trial. |  |
| 2e | Demonstrate a workflow process, including workflow steps and tasks, reviews and approvals, queue management, task routing, manager workflow monitoring, queue reporting, and workflow setup and configuration capabilities. |  |
| 2f | Demonstrate the PAS’s ability to manage and calculate multiple forms of DROs, set up and maintain DRO recipients/alternate payees, benefit splits, divorce decrees, etc. and amend an existing benefit, if applicable. |  |
| 2g | Demonstrate user activity history (i.e. data viewed, updated or deleted) and an audit/update history of information in a member’s account and portal. |  |
| 2h | Demonstrate CRM functionality, including viewing a caller/user dashboard, viewing and updating call notes, and search/retrieval of online help information (i.e. simulate member online support). |  |
| 2i | Demonstrate the ability for BCERS staff to set up personal PAS preferences and dashboards. |  |
| 2j | Demonstrate the ability for BCERS staff to set up user accounts and establish security rights, including any differences between BCERS staff accounts and member and employer accounts. |  |
| 2k | Demonstrate data drill down features (i.e. sort, filter, and summary/detail view of a dataset) and ability to export/print the dataset. |  |
| 2l | Demonstrate a buyback workflow process, including initial purchase request, purchase quote (estimate), and setup of payment schedule. |  |
| 2m | Demonstrate BCERS’ ability to meet, message or chat with an online member or employer through the PAS. |  |
| 2n | Demonstrate BCERS’ ability to generate an annual actuarial report/file. |  |
| 2o | Demonstrate BCERS’ ability to generate annual 1099s, including the ability to generate a standalone 1099. |  |
| 3a | Benefit Processing | ·Demonstrate BCERS running a benefit estimate. |  |
| 3b | Demonstrate the calculation workflow of a benefit. Include the setting up of payment instructions with tax elections and tax exclusions. Include full and early service, Line of Duty, Non-Line of Duty, etc., and ability to override.  Demonstrate the application workflow to track the status of new retiree files such as “all forms submitted”, “all documents received or missing documents”, “awaiting next level approval”, “received final approval or still missing items” |  |
| 3c | Demonstrate the application and calculation workflow of a refunds. Include the setting up of payment instructions with a portion of the refund to cash and the other to a rollover. |  |
| 3d | Demonstrate the adjustment of an existing retirement benefit including retroactive salary adjustments or error correction. |  |
| 3e | Demonstrate the disbursement or (retiree payment) processing of a group of benefit payments (i.e., refunds or regular annuity payments) via mass processing or “batch” processing. |  |
| 3f | Demonstrate the process of reconciliation of a retiree disbursement batch, including extraction of General Ledger data for the external accounting solution. |  |
| 3g | Demonstrate how the PAS handles active, retired, or deferred death processing. |  |
| 4a | Member Self-service | Demonstrate the features of the member’s self-service portal. Show how a new member registration includes multi-factor authentication, password setup/reset, and session timeout. |  |
| 4b | Demonstrate a member viewing and making self-service changes to their demographic and banking information (e.g. address, bank information, etc.) |  |
| 4c | Demonstrate a member running an online estimate using different dates, beneficiaries, and benefit options. |  |
| 4d | Demonstrate the workflow for the application process and the calculation of a retirement benefit from a member self-service portal. |  |
| 4e | Show a view of different member online statements, including 1099 statements, contribution statement, and benefit award letter. |  |
| 4f | Demonstrate a member viewing of uploaded/imported electronic documents and the member’s ability to upload a new electronic document, alerts and notifications for missing documents, pending tasks, status changes, and upcoming deadlines. |  |
| 4g | Demonstrate a member’s ability to schedule an appointment with an analyst. Demonstrate member alerts and notifications for missing documents, pending tasks, status changes, and upcoming deadlines |  |
| 4h |  | Demonstrate how member service requests flow from the portal into internal workflows, including how administrators can view, track, and engage with members directly through the portal |  |
| 4i |  | Demonstrate case management tools including internal notes, virtual meetings, appointments, pop-up screens messaging for individual or targeted group. |  |