

Pension Administration System Request for Proposals Questions

Date: September 16, 2019

SECTION	QUESTION	ANSWER
2	What type of database does the PAS use?	SQL
2	Can MEABF provide a listing of interfaces used by the PAS?	Currently manual import/export process
2	Optional system components	Self Service (member portal) ad hoc reporting, hosting. Please price separately.
5	Frequency of payroll submittals	7 agencies submit payroll between 24-26 times a year
5.3	Details of access to 457 plans	MEABF wants to establish access to the 457 plans
5.4	Interface with Master Custodian	All benefit payments are generated by the Fund's Master Custodian, including 1099R. Reconciliation files are provided. MEABF wants to establish a secure interface with the Master Custodian.
5.5	The proposal must discuss utilizing Microsoft® centric technology in order to easily integrate with existing systems.	MEABF currently utilizes the Microsoft® suite of software and is migrating to Microsoft® 365.
5	What existing systems should the new PAS integrate with as part of the implementation?	Insite – the MEABF's electronic record's management system, Great Plains
6.1.2	Has MEABF ever cleansed its data.	MEABF reviews its data annually
6.1.2	How many data sources will exist which need to be incorporated into the new PAS?	Excel, Word and Access, PDF
6.1.2	List of multiple data sources and current issues	Data sources include Access and Excel. Issues include incorrect coding of employees, missing information, etc.
6.1.4	High level requirements for member portal	Secure access to member's personal data, retirement information, member's electronically maintained membership file
6.2.5	What type of system documentation and audience?	User manuals that are utilized for reference and training purposes
6.4.6	Details on the Return to Work process	Individuals who return to work have their annuities recalculated if they work in excess of three years.
6.4.13	High level requirements for Electronic Content Management	Link current ECM with PAS and member portal
6.4.12	What is the percentage of rehired retirees	< 1% annually

6.4.13	Does MEABF have an Electronic Content Management System that they are replacing? How many users will be utilizing the ECM?	We are not replacing the current ECM. Approximately 30 staff have access to the ECM.
--------	--	--

6.4.13	Does MEABF intend to include scanning or capturing as a part of the ECM? If so how many scanners will be indexing documents.	This is currently being done. MEABF has two scanners for this purpose.
6.4.14	How many elected officers have not retired from the optional plan	Approximately 20
6.4.15	What is the financial software utilized by MEABF	Great Plains
6.5	Is MEABF seeking a hosted solution without the on-premise option?	No.
6.5	Is MEABF seeking a disaster recovery site for PAS users to perform daily activities?	MEABF is seeking a virtual site that may be used for PAS users to perform daily