Phase 1: SJCERA Question & Answer

The following table contains a list of SJCERA answers to Phase 1 offeror questions in preparation for the solution demonstrations for selected offerors in Phase 2.

# Question & Answer

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| RFP Section / Source | Offeror Question | SJCERA Answer |
| Attachment A, Section 2. Minimum Qualifications | While we can meet your requirement for data to be kept in the US and to have no offshore access, would you be willing to modify your requirement and allow suitably authorized our support personnel from WTOGPA signatory countries (e.g. UK and Canada) to securely access your data remotely? This would allow us to provide you with a wider range of cost-effective support options in our response. | SJCERA would consider allowing access for WTO GPA signatory countries to securely access data; however, offerors would need to seek prior approval from SJCERA and provide background checks for any personnel with remote access to SJCERA data. Please provide optional pricing in your response so that SJCERA may consider the cost-savings associated with such support. |
| Attachment C – Solution Demo Response Form – line 3d | Please provide more information, including an example, related to the types of adjustments to existing retirement benefits. | SJCERA would like offerors to demonstrate the ability for their PAS to accommodate required changes (for any reason) to a benefit; e.g., trailing wages, death overpayment, retroactive benefit payments, benefit override, etc. |
| Attachment C: Solution Demonstration Form – 3. Demonstration Scenarios – Demonstration Scenario: Member Services, ID #3K: | Can you please confirm that this is the process of requesting a retirement benefit calculation estimate? Or is this the process of a member’s selected retirement benefit option? | SJCERA would like offerors to demonstrate the end-to-end process for a member to initiate their retirement via their member portal. This process includes, but is not limited to, reviewing an estimate, selecting beneficiaries and available benefit options, completing a benefit application, providing required documentation, making tax elections, banking information, etc. |
| Attachment C Demo Scenario 3d, Benefit Processing | Can SJCERA please provide clarification or an example of this demo scenario so that vendors can address this properly if selected for Phase 2. | SJCERA would like offerors to demonstrate the ability for their PAS to accommodate required changes (for any reason) to a benefit; e.g., trailing wages, death overpayment, retroactive benefit payments, benefit override, etc. |
| 01 SJCERA PAS RFP Main RFP Document, Section 6.2.2 Phase 2: Sessions with Qualified Offerors and SJCERA | Would SJCERA consider scheduling Session 2: One 2-hour Q&A Session to discuss technical questions, project approach, and the proposed project team prior to Session 1: One 3-hour Solution Demonstration with a Q&A Option for SJCERA? | SJCERA intentionally scheduled demonstrations prior to Q&A and will not be making any changes to the session order. |
| 01 SJCERA PAS RFP Main RFP Document, Section 6.2.2 Phase 2: Sessions with Qualified Offerors and SJCERA | Would SJCERA consider extending Phase 2? Due to prior commitments, key personnel will be unavailable from July 7 through July 15. Should we be down selected for Phase 2, we respectfully request that our Session 1 (Solution Demonstration) be scheduled with SJCERA for the week of July 21. | While SJCERA understands the scheduled window for demonstrations and Q&A may be short, SJCERA expects vendors to be able to demonstrate the prescribed scenarios without much planning or preparation, given the "out-of-the-box" nature of proposed solutions. |
| 01 SJCERA PAS RFP Main RFP Document, Section 6.2.2 Phase 2: Sessions with Qualified Offerors and SJCERA | For the 2-hour Question and Answer session to discuss technical questions, project approach, and the proposed project team, will SJCERA be providing specific topics or questions in advance as part of the Invitations to the Offerors? | Technical questions addressed during the Q&A would be to get a high-level understanding of the requirements outlined in Section 4 of the RFP. Please review Section 4 to prepare for the discussion. |
| Attachment C, Section 2. Demonstration Instructions, Item #5, General Question | Can SJCERA provide additional information regarding its data conversion efforts? Given the 18- to 24-month implementation time, we would like to better understand the state of SJCERA's historical data, including any data cleansing activities that have already been initiated or completed. | This question will be answered during the discovery session in Phase 3 of the procurement process. |