

ID #	Functional Area	Description / Requirement	Offeror Response: "We Agree" or "Not Met"	Offeror Response: Met as "B" (Base) or "C" (Custom)	Offeror Explanation / Reference / Notes
1	Accounting	Ability to track return of deceased member payments from carrier through vendor payroll and apply to member overpayments.			
2	Accounting	Ability to accept and record employer payments by Wire Transfer or check.			
3	Accounting	Ability to import a check reconciliation file to update the status of benefit payments and other distributions.			
4	Accounting	Ability to export general ledger activity that distributes or spreads entries to the clearing account.			
5	Accounting	Ability to accept and apply partial or excess payments on purchase of service contracts without dropping transaction detail either in PAS or in extract files.			
6	Accounting	Ability to apply payment received to the resulting charge(s) for a transmittal including for employer contributions, employee contributions and employee/member deductions for purchase contracts.			
7	Accounting	Ability to write-off open receivables balances (e.g. balances remaining under \$1) arising from contributions due through transmittal filing or for purchase of service.			
8	Accounting	Ability to export data from PAS with batch level detail (i.e. do not aggregate batch detail into a single value).			
9	Accounting	Ability to export general ledger detail on demand without limitation to frequency (e.g. export on a daily basis and not be limited to monthly extracts).			
10	Accounting	Ability to generate correspondence to employer (via employer portal notification) regarding discrepancies in the transmittal file including for additional funds required.			
11	Accounting	Ability to report all member transaction activity associated with general ledger accounts.			
12	Accounting	Ability to prohibit from or allow the user to cancel contract or individual payments.			
13	Accounting	Ability, when a purchase payment is canceled, to correctly create the general ledger transactions.			
14	Accounting	Ability to track write-offs and unclaimed items within a range specified by CCCERA.			
15	Accounting	Ability to generate a Balance by Member Status report			
16	Accounting	Ability to generate a Member Compensation report			
17	Accounting	Ability to generate various extract data files to be used in the production of GASB Actuary Reports			
18	Accounting	Ability to generate a Benefit Payments by Employer and Tier report			
19	Activity Tracking	Ability to automatically capture, retrieve and categorize/sort all interactions with members, regardless of communication channel (e.g., e-mail correspondence, telephone calls, counseling sessions, etc.) to include but not be limited to member name, communication threads, communication channel, date, time, comments, routing, status of request, etc.			
20	Activity Tracking	Ability to categorize all member interactions based on the interaction topic to include but not be limited to request for information, disability, death, etc.			
21	Activity Tracking	Ability to automatically capture, index appropriately, and subsequently retrieve all CCCERA responses to any member interactions (including e-mail, correspondence, telephone calls, counseling sessions, personal contact)			
22	Activity Tracking	Ability to limit access for certain activities such as being able to modify or delete an appointment			
23	Activity Tracking	Ability to capture a form request (form requested, date requested, date mailed, the requestor, the recipient)			
24	Activity Tracking	Ability to capture in the activity tracking log all information that was historically provided / sent to the member and when			
25	Activity Tracking	Ability to automatically capture all contacts with third parties, regardless of communication channel, to include but not be limited to company name, contact, date, time, comments, status of request, etc.			
26	Activity Tracking	Ability to capture, at the individual member level, the preferred means of communication to include but not be limited to mail, telephone, e-mail, etc.			
27	Activity Tracking	Ability to generate a report of the activity log by various criteria to include but not be limited to date, contact, communication channel, interaction topic, etc.			
28	Activity Tracking	Ability to print any activity tracking view exactly as it appears on the user's screen.			
29	Activity Tracking	Ability to provide managers with appointment / counseling session related information and metrics.			
30	Activity Tracking	Ability to integrate activity tracking log capabilities with the PAS system and imaging system/workflow system(if appropriate), not requiring duplicate input of data or separate action and / or access modes.			
31	Activity Tracking	Ability for users to tie documents, images, spreadsheets, and similar or related items to any activity tracking log entry.			
32	Activity Tracking	Ability to access activity tracking log entries by various criteria to include but not be limited to member ID, name, date of birth, and phone number.			
33	Activity Tracking	Ability to automatically link calendar activities to existing contact data.			
34	Activity Tracking	Ability to automatically pass the document code / document name of imaged documents from the imaging system to the PAS system.			
35	Activity Tracking	Ability to automatically update the activity tracking database for life events, including but not limited to beneficiary designation, request for retirement benefit estimate, retirement application, disability application, termination of employment, refund requests, service credit purchases, death of member, retiree, or beneficiary, etc.			
36	Activity Tracking	Ability to display all activity tracking transactions dates and times			
37	Activity Tracking	Ability to display all comments / notes attached to a member's account; as well as add notes including the user and date/time the note was added			
38	Activity Tracking	Ability to easily access all pertinent information on any stakeholders (member, retiree, beneficiary, third party payee, other retirement system, etc.) when a contact occurs			
39	Activity Tracking	Ability to produce forms / correspondence online; consolidate multiple documents for the same person and print in a single print job, add image copy to member folder, and update activity tracking log			
40	Activity Tracking	Ability to provide the same activity tracking features applicable to organizations (employers, banks, 3rd parties, etc.) as those that are applicable to people (members, beneficiaries, etc.)			
41	Activity Tracking	Ability to provide one (1) densely packed customer service screen (inquiry only) that contain as much summary information as possible for given functional areas (death, refund, pension payroll, disability, beneficiary, etc.) and the ability to drill-down for detailed information if so desired by the user			
42	Activity Tracking	Ability to provide one (1) densely populated customer service summary screens containing as much important user information as feasible and to scroll through entire member's account to see all pertinent information at a glance rather than searching numerous screens and programs in a piece-meal fashion			

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43	Activity Tracking	Ability to capture and retrieve when a mass communication was sent, to whom and how it was sent to each member to include but not be limited to postal service, e-mail, etc.			
44	Activity Tracking	Ability to update activity tracking information to reflect the most recent transaction or information provided to the member via the system (i.e., change in beneficiary, retirement estimate, etc.) or as a result of a communication between CCCERA and the member – phone, e-mail, mail, FAX, or in person			
45	Activity Tracking	Ability to sort and filter comments associated by business area/process.			
46	Activity Tracking	Ability to generate reports for telephone statistics (type of call, type of caller, forecasting)			
47	Activity Tracking	Ability to generate contact statistic reports based on date, topic, communication type or topic.			
48	Activity Tracking	Ability to generate automatic alerts when member requests remain unfulfilled beyond the CCCERA defined timeframe.			
49	Activity Tracking	Ability to notify members of any changes that have been made to their account.			
50	Activity Tracking	Ability to assign multiple security roles to an individual user.			
51	Annual Statement	Ability to export, according to a CCCERA defined file format, data required to populate an active member statement or benefit statement.			
52	Annual Statement	Ability to provide a control report listing all members who did not receive Membership Statements and the reason for each member.			
53	Annual Statement	Ability to provide management reports that provide various statistics including, but not limited to total number of accounts, number of statements generated, number of statements unable to be generated, and total occurrences of critical missing information by type.			
54	Annual Statement	Ability to display and print duplicate Membership Statements by the member or staff from a Web utility			
55	Annual Statement	Ability to display online and print prior-year Membership Statements, "identical" in both content and format to the original.			
56	Annual Statement	Ability to extract and provide all appropriate Membership Statement data in the format prescribed by CCCERA with statement content driven by membership characteristics.			
57	Annual Statement	Ability to generate the annual Membership Statement in 8.5 by 11 presentation.			
58	Annual Statement	Ability to display the lowest level, as identified by the CCCERA, of transaction type, account transaction and date detail (e.g., bi-weekly, semi-monthly, etc.) on Membership Statements.			
59	Annual Statement	Ability to display the most recent / current employer name(s) on Membership Statement.			
60	Annual Statement	Ability to provide on the member's Membership Statement the appropriate CCCERA defined messages pertaining to the member's benefit, depending on the member's account information, such as employer type or accumulated service.			
61	Annual Statement	Ability to produce Member Statements utilizing a CCCERA defined method, including but not limited to an extract file to be printed by 3rd party, printing statements on pre-printed stock or blank pages; or by making the information available via web-portal.			
62	Annual Statement	Ability to generate a "Revised" Membership Statement for those members that are affected by any type of adjustment / correction.			
63	Annual Statement	Ability to handle a new format for the Membership Statement should CCCERA elect to change / modify the format.			
64	Annual Statement	Ability to identify members eligible to receive a Membership Statement, based on CCCERA defined criteria.			
65	Annual Statement	Ability to provide for beneficiary information to be displayed on Membership Statements.			
66	Annual Statement	Ability to provide for earliest retirement date to be displayed on Membership Statements.			
67	Annual Statement	Ability to provide, on the Annual Statement, the member's service credit total and a break-out of service credit according to CCCERA defined criteria, Tier, etc. such as by type (Military, Accrued), and by employer.			
68	Annual Statement	Ability to sort Membership Statements per the Membership Statement distribution indicator (i.e., alphabetical, by employer / department, etc.)			
69	Annual Statement	Ability to highly parameterize the layout and design of the Membership Statement so that annual changes to the annual statement content and format can be implemented without extensive coding and testing.			
70	Annual Statement	Ability to periodically run various queries for defined populations for postcards, direct mailings, etc. based on defined extract criteria			
71	Audit & Security	Ability to encrypt any information CCCERA deems appropriate to include but not be limited to PAS database, system security and role-related information.			
72	Audit & Security	Ability to establish and set up Web-based application screens and Mobile Devices.			
73	Audit & Security	Ability to restrict CCCERA users from updating records with their own personal information. Such updates shall be permitted by CCCERA users via additional audit / security measures.			
74	Audit & Security	Ability to provide adequate audit trails of system updates to include but not be limited to appropriate change controls requiring management approval of any software modifications or changes prior to implementation.			
75	Audit & Security	Ability to capture an audit transaction on all CCCERA specified transactions.			
76	Audit & Security	Ability to capture the designation of each user (i.e., CCCERA staff, member, retiree, etc.) and specific capabilities, security levels, and authority to perform transactions (i.e., add, change, inquiry, delete).			
77	Audit & Security	Ability to capture user permissions to determine how far back in time a user can post a transaction; only authorized users should be able to post to a closed month.			
78	Audit & Security	Ability to correct any errors and/or irregularities or to send the transaction back to the originator for re-work.			
79	Audit & Security	Ability to adhere to CCCERA standards to include but not be limited to user-id and password administration and frequency of changing passwords.			
80	Audit & Security	Ability to keep track of a user's last access date/time by user-id.			
81	Audit & Security	Ability to monitor the number of successful and unsuccessful access (logon) attempts and to create audit trails showing these events.			
82	Audit & Security	Ability to maintain both before and after views of database changes.			
83	Audit & Security	Ability to set up, maintain and monitor roles and responsibility for system management, usage and maintenance.			
84	Audit & Security	Ability to support data classification levels to include but not be limited to secret, confidential, private, restricted, public and unclassified.			
85	Audit & Security	Ability to secure Web-based applications and Mobile Applications based on industry standards.			
86	Audit & Security	Ability to adhere to CCCERA security policies, bulletins, standards and procedures.			
87	Audit & Security	Ability to assign access level and/or security role to a user for a pre-defined period of time.			

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88	Audit & Security	Ability to audit member accounts randomly without a triggering event.			
89	Audit & Security	Ability during a member account audit to flag the record as audited, the date it was audited, the time period/transactions audited and by whom.			
90	Audit & Security	Ability to ensure data security measures are employed to prevent unauthorized access of data and/or changes to it.			
91	Audit & Security	Ability to ensure that no audit trail data can be deleted.			
92	Audit & Security	Ability to ensure that security profiles are protected from unauthorized access.			
93	Audit & Security	Ability to extract audit log information in order to produce meaningful and useful security reports.			
94	Audit & Security	Ability to track changes made to any data regardless of the means by which the change was made to include but not be limited to PAS solutions and employer or member Web site or Mobile Applications.			
95	Audit & Security	Ability to generate audit report(s) identifying all people, processes, dates and/or times involved in changing member and employer data.			
96	Audit & Security	Ability to setup and maintain a process to monitor all system access (users internal or external to CCCERA and logged into the PAS System).			
97	Audit & Security	Ability to log a user off the system after a user-definable period of inactivity as specified by CCCERA.			
98	Audit & Security	Ability to maintain a historical record of user-ids issued, including the identity of the person associated with the user-id and the timeframe during which the user-id is and was valid.			
99	Audit & Security	Ability to generate an audit trail report of all program code changes to include but not be limited to date, time, version, change that was made, workstations and author.			
100	Audit & Security	Ability to generate security reports on a regular basis to include but not be limited to violations and access to sensitive files.			
101	Audit & Security	Ability to prompt a person with a "challenge phrase" after a user-definable number of unsuccessful log-on attempts.			
102	Audit & Security	Ability to generate a security report to include but not be limited to listing users, their roles and security access.			
103	Audit & Security	Ability to provide a single integrated user logon into all applications regardless of the number of sub-systems that are being connected in accordance with CCCERA standards.			
104	Audit & Security	Ability to provide access rules and role assignment which will restrict departmental employees from performing incompatible functions or functions beyond their responsibility.			
105	Audit & Security	Ability to encrypt any secret, confidential, private, or restricted information that will be stored in a non-secure location or transmitted over open networks, such as the Web.			
106	Audit & Security	Ability to generate formatted audit reports that show (for user-selected user-id's, date-range, and/or members [selected by last name, social security number, or other unique identifier]) all changes made to member records, including before and after images; an "all members option must be included.			
107	Audit & Security	Ability to provide unique user identification and automatic log-off.			
108	Audit & Security	Ability to provide various levels of security and adhere to existing security structures to include but not be limited to network security, application security, development environment security and Web-access security – with procedures for support and maintenance for each.			
109	Audit & Security	Ability to restrict access to the system by user identification and passwords, at a minimum.			
110	Audit & Security	Ability to maintain and prevent re-use of passwords already used by a user.			
111	Audit & Security	Ability to run ad hoc reports of audit trail history by transaction type, transaction date, input date or any of the fields related to the audit trail records.			
112	Audit & Security	Ability to support different types of security structures to include but not be limited to a business-process security structure, a transaction based security structure and a window level security structure.			
113	Audit & Security	Ability to track sign-on access from multiple computers by user-id.			
114	Audit & Security	Ability to ensure that all transactions have a user ID and transaction date associated with them.			
115	Audit & Security	Ability to provide applicable levels of internal controls and appropriate segregation of duties to include but not be limited to the ability to approve any activity's results as well as any correspondence to be sent or printed.			
116	Audit & Security	Ability for auditors to audit account transactions.			
117	Audit & Security	Ability to display, query and print the history of all changes.			
118	Audit & Security	Ability to remove an audited account flag if data within the audited period changes.			
119	Audit & Security	Ability to provide external users as well as internal users with password and user id recovery.			
120	Audit & Security	Ability to monitor and report on all internal and external users' access rights, individually or as a group.			
121	Audit & Security	Ability to maintain historical records of user access rights.			
122	Audit & Security	Ability to restrict CCCERA user access to the system by location and/or device.			
123	Audit & Security	Ability to support Multi Factor Authentication (MFA).			
124	Beneficiary Maintenance	Ability to accept beneficiary information without Social Security number.			
125	Beneficiary Maintenance	Ability to name and set up a Primary and/or Alternate beneficiary; who may be an individual, Guardian, Trust, Estate, Charity, etc. as a beneficiary.			
126	Beneficiary Maintenance	Ability to establish the percentages and payment priority for each beneficiary nominated.			
127	Beneficiary Maintenance	Ability to support bi-directional links between member(s) and beneficiary(ies), alternate payees, dependents, and/or survivors so that end-users can search on a beneficiary's SSN and/or unique ID and locate the original member's account.			
128	Beneficiary Maintenance	Ability to suspend the retirement process of the member until any and all discrepancies with beneficiaries have been resolved.			
129	Beneficiary Maintenance	Ability to capture and maintain guardians, conservators, power-of-attorney and other legal designations.			
130	Beneficiary Maintenance	Ability to capture, maintain, query against, and display multiple beneficiaries, survivors and dependents and all data associated with each to include but not be limited to name, address, DOB, SSN, unique identifier, gender, relationship, type, distribution, percentage, factor and dollar amount, as appropriate.			
131	Beneficiary Maintenance	Ability to enter, maintain, query and report against the survivor for a retiring or retired member.			
132	Beneficiary Maintenance	Ability to capture and maintain separate beneficiaries for different types of benefits (where applicable based on CCCERA rules).			
133	Beneficiary Maintenance	Ability to capture, update, inquire and delete beneficiary change information.			
134	Beneficiary Maintenance	Ability to determine whether the retiree is allowed to change beneficiary based on the retirement option chosen or restrictions placed on account.			

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135	Beneficiary Maintenance	Ability to display current member address information and update that information when processing a beneficiary change form.			
136	Beneficiary Maintenance	Ability to enclose a "Nomination of Beneficiary" correspondence explaining what corrections are needed and include a pre-filled new form with the correct information and what missing/incorrect information is still needed			
137	Beneficiary Maintenance	Ability to complete beneficiary changes that are flagged as pending.			
138	Beneficiary Maintenance	Ability to automatically generate correspondence to members who have not elected a beneficiary also sending a pre-filled Beneficiary Change form to be completed and returned.			
139	Beneficiary Maintenance	Ability to generate various Acknowledgement correspondence to include but not be limited to beneficiaries, estate and trust.			
140	Beneficiary Maintenance	Ability to maintain an indicator that a beneficiary change has been initiated but not completed.			
141	Beneficiary Maintenance	Ability to ensure that an alternate beneficiary cannot also be a primary beneficiary and vice versa.			
142	Beneficiary Maintenance	Ability to ensure that if a minor is added as a primary beneficiary, then a guardian is also established.			
143	Beneficiary Maintenance	Ability to determine that a member did not name self as a beneficiary.			
144	Beneficiary Maintenance	Ability for end-user to review and update beneficiary data on file.			
145	Beneficiary Maintenance	Ability to capture and maintain beneficiaries of survivors.			
146	Beneficiary Maintenance	Ability to update (automatically sync) beneficiary information (i.e., name, address, etc.) across all accounts / instances where someone happens to be a beneficiary for multiple people and their information is updated; however their beneficiary nomination, their percentages, their status, etc. should not be updated just because it is updated in another account.			
147	Beneficiary Maintenance	Ability to update a beneficiary's name and address if they are also a member and a change of information is reported by their employer through the "Import" process.			
148	Beneficiary Maintenance	Ability to include all beneficiaries, survivors, etc., as part of Life Status 360 process.			
149	Beneficiary Maintenance	Ability to restrict the benefit distribution or allocation not to exceed 100% at the setup of the benefit.			
150	Beneficiary Maintenance	Ability for system to display no active beneficiary or incomplete beneficiary information when first looking up member (first page).			
151	Beneficiary Maintenance	Ability for system to reallocate benefit equally to remaining active beneficiaries when one or more beneficiaries are deceased (for multiple primary designations – exclude DRO benefits)			
152	Benefit Estimates	Ability to include tax deductions (i.e., Federal and California) in the initial benefit calculation to yield estimated net benefit.			
153	Benefit Estimates	Ability to provide what-if analysis capability by allowing the user of the estimating tool to adjust benefit estimate parameters and view new calculation results.			
154	Benefit Estimates	Ability to provide a Web-based benefit estimate calculator, using same engine as the tool used to calculate final benefit, to assist members with estimating their pension amount.			
155	Benefit Estimates	Ability to capture a benefit estimate request received by any type of communication channels			
156	Benefit Estimates	Ability to capture both standard and customized comment fields for inclusion on the benefit estimate.			
157	Benefit Estimates	Ability to populate all data used in benefit estimate calculation from available system data to include but not be limited to years of service and current salary.			
158	Benefit Estimates	Ability to generate in a standardized correspondence format the benefit estimate for all retirement types and retirement options.			
159	Benefit Estimates	Ability to print estimates in both a summary and detailed view.			
160	Benefit Estimates	Ability to generate benefit estimates off-site via the Web and capture each estimate to the member's record.			
161	Benefit Estimates	Ability for CCCERA staff to modify or delete benefit estimates that have not been printed or distributed.			
162	Benefit Estimates	Ability to print, archive, recall and display benefit estimates in both a summary and detailed view.			
163	Benefit Estimates	Ability to calculate actual value and/or accrued benefit of the member's account as of the divorce date, based upon overlapping dates of the marriage and dates of service, while determining when the member would be eligible for unreduced benefit and dollar amount.			
164	Benefit Estimates	Ability to calculate benefit estimates for all retirement types, including but not limited to service, disability, multiple tiers, early and vested and all retirement options including future plan changes.			
165	Benefit Estimates	Ability to calculate contributions, interest and service through the member's projected date of retirement based on the member's employment status and calculate benefit estimates accordingly.			
166	Benefit Estimates	Ability to calculate multiple benefit estimates for a member with the estimator, needing to enter only those fields that are changed on each iteration, displaying and highlighting the results side-by-side for comparison purposes.			
167	Benefit Estimates	Ability to determine thresholds to include but not be limited to the member's earliest retirement date, normal retirement date, etc. based on the retirement eligibility rules.			
168	Benefit Estimates	Ability to identify and flag frequent callers who repeatedly request benefit estimates, as defined by CCCERA.			
169	Benefit Estimates	Ability to identify special conditions within a member's account to include but not be limited to outstanding purchase of service, an account audit, pending adjustments, active account, deferred account, vested, etc.; as it relates to performing the benefit estimate.			
170	Benefit Estimates	Ability to include "increases" as projections in the benefit estimates, including variable increase rates and/or project COLA increases.			
171	Benefit Estimates	Ability to perform all Final Average Salary computations for all retirement tiers and retirement types.			
172	Benefit Estimates	Ability to provide a standardized on-line form for a member to initiate a request for an official benefit estimate via the Web.			
173	Benefit Estimates	Ability to verify current data in the member's account prior to performing an estimate.			
174	Benefit Estimates	Ability to save the parameters and results of the each generated and saved benefit estimate.			
175	Benefit Estimates	Ability to support IRS 415 limitations and PEPRA compensation limits in generating benefit estimates.			
176	Benefit Estimates	Ability to uniquely identify each benefit estimate that is generated by automatically assigning specific criteria to include but not be limited to a benefit estimate number, staff initials, userid, date and time produced.			
177	Benefit Estimates	Ability for staff to use member's beneficiary information on file when performing a benefit estimate and to over-ride and/or change beneficiary for calculation purposes, if needed.			
178	Benefit Estimates	Ability to view any supporting documentation directly associated with a specific benefit estimate.			
179	Benefit Estimates	Ability to include service available for purchase or for buy back and its cost in the benefit estimate.			
180	Benefit Estimates	Ability to generate retirement estimates (including all related correspondence) in mass by providing a list of members (identified by SSN and/or other CCCERA identifier), by entering a list of input parameters, accepting a file, or input from another process.			

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181	Benefit Estimates	Ability to include in an estimate all mandated amounts to include but not be limited to required mandated distributions (Required Minimum Distribution 70 1/2 or 72 years of age), tax liens, QDROS and any other court orders.			
182	Benefit Estimates	Ability to estimate a benefit based on a projected qualified domestic relations order percentage.			
183	Benefit Estimates	Ability to define and modify the number of months or years used for the final average salary calculation.			
184	Benefit Estimates	Ability to maintain factors used for calculating benefit estimates.			
185	Benefit Estimates	Ability to adjust FAS and service with adjusting entries that only impact the estimate and are not recorded in the member's historical record.			
186	Benefit Estimates	Ability to incorporate reciprocity status in the benefit estimate process and benefit estimate derived.			
187	Benefit Estimates	Ability to limit salary based on IRC 401a17 code and PEPRA limits in the benefit calculations, for impacted members, in the calculation engine used by staff as well as through member portal.			
188	Benefit Estimates	Ability to define annual 401(a)(17) limits and annual PEPRA limits for both Social Security Integrated and non-integrated.			
189	Benefit Estimates	Ability for employers to report that a member has exceeded the 401(a)(17) or PEPRA limits and no longer is required to contribute.			
190	Benefit Estimates	Ability to generate the Members Flagged for 401(a)(17) Limit report.			
191	Benefit Processing and Calculations	Ability to create, update and maintain retirement age and factor tables.			
192	Benefit Processing and Calculations	Ability to capture reasons for inaccuracies or incompleteness on the retirement application and/or other related documents.			
193	Benefit Processing and Calculations	Ability to enter reviewer messages explaining what modifications and/or corrections need to be made by CCCERA staff when the reviewer returns a work item after completion of review/QA.			
194	Benefit Processing and Calculations	Ability to notify auditors of various case specifics or special situations prior to their auditing work and/or accounts.			
195	Benefit Processing and Calculations	Ability to release record for payment only after benefit calculation is verified and audited.			
196	Benefit Processing and Calculations	Ability to return record for changes if verification unsuccessful.			
197	Benefit Processing and Calculations	Ability to route all types of benefit calculations to a review/QA pass in accordance with CCCERA business rules and operational procedures.			
198	Benefit Processing and Calculations	Ability to validate all record changes against existing business rules.			
199	Benefit Processing and Calculations	Ability to capture retirement application information to include but not be limited to option selection, tax withholding, beneficiary and survivor.			
200	Benefit Processing and Calculations	Ability to record, track and display the receipt of the benefit application.			
201	Benefit Processing and Calculations	Ability to track information based on CCCERA defined parameters and generate reports to include but not be limited to identifying number of retirement calculation requests received, dates received, date completed and by whom.			
202	Benefit Processing and Calculations	Ability to generate a correspondence detailing the under or over payment of benefits and the steps that will be taken to either recoup the overpayment or provide payment to offset the underpayment.			
203	Benefit Processing and Calculations	Ability to generate correspondence to member acknowledging receipt of payment for any overpayment or other receivable due.			
204	Benefit Processing and Calculations	Ability to produce system generated correspondence informing new retirees of their initial benefit.			
205	Benefit Processing and Calculations	Ability to support the generation of retirement application packets containing a cover correspondence and all necessary forms appropriate to the member's situation to include but not be limited to retirement application, rollover form and beneficiary nomination.			
206	Benefit Processing and Calculations	Ability to remove a retiree from payroll and calculate the amount of funds to be returned to CCCERA and display results and current payment status.			
207	Benefit Processing and Calculations	Ability to override benefit estimate parameters based on CCCERA defined criteria.			
208	Benefit Processing and Calculations	Ability to automatically calculate a retiree's payroll amounts including but not limited to gross annuity, deductions, disbursements, transfer amount and taxes, according to business rules and laws.			
209	Benefit Processing and Calculations	Ability to configure the system to include business rules that will automatically determine "windows of eligibility" special retirement rules or circumstances as defined by special legislation and apply these business rules to benefit calculations.			
210	Benefit Processing and Calculations	Ability to automatically pre-fill user defined member information on all benefit calculation forms that are printed by CCCERA staff and for those printed via the member over the web.			
211	Benefit Processing and Calculations	Ability to automatically record receipt of benefits returned and update member's account.			
212	Benefit Processing and Calculations	Ability to automatically calculate Final Average Salary in accordance with plan provisions, including all types of allowable service and all breaks in service.			
213	Benefit Processing and Calculations	Ability to generate a listing of the new retirees and their calculated transfer amounts and include / compute a total transfer amount that needs to be moved from the Member Reserve fund to the Pension Reserve fund.			
214	Benefit Processing and Calculations	Ability to closeout a member account for any trailing monies that may have been received after the initial or finalized benefit calculation and adjust payment accordingly.			
215	Benefit Processing and Calculations	Ability to automatically calculate underpayment and/or overpayment when comparing initial benefit amount to final benefit amount.			
216	Benefit Processing and Calculations	Ability to define and enhance benefit calculation logic and/or specifications to include but not be limited to changes due to any future legislation for calculating a final average salary, final contributions, final interest and final service.			

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217	Benefit Processing and Calculations	Ability to determine eligibility for all types of retirement to include but not be limited to early, service, disability and death during active membership.			
218	Benefit Processing and Calculations	Ability to determine, extract, and display what portion of the member's total benefit is funded by the member's and employer's contribution, respectively.			
219	Benefit Processing and Calculations	Ability to flag or cancel an incomplete benefit calculation transaction when a member rescinds retirement or before they cash their 1st pension check.			
220	Benefit Processing and Calculations	Ability to follow up on flagged beneficiary, address and electronic funds transfer changes that are pending.			
221	Benefit Processing and Calculations	Ability to manage and apply calendar year end closing as it relates to benefit calculation and payroll.			
222	Benefit Processing and Calculations	Ability to manage retroactive payments and disburse them in the same media as the normal pension payment.			
223	Benefit Processing and Calculations	Ability to identify when the final salary, contribution and service information have been reported by the employer and re-calculate the monthly annuity.			
224	Benefit Processing and Calculations	Ability to maintain at the participant and the summary level an excess benefit file in correspondence with IRS 415 (b) and (c) rules.			
225	Benefit Processing and Calculations	Ability to provide a checklist detailing which retirement application documents have been sent, received and/or which are still outstanding.			
226	Benefit Processing and Calculations	Ability to provide direct access to a member's detailed account information from a benefit calculation screen(s) for viewing and research purposes, with the additional ability to print this information.			
227	Benefit Processing and Calculations	Ability to provide reason and reason code for any overpayments.			
228	Benefit Processing and Calculations	Ability to re-calculate finalized benefit for a person who dies after the benefit calculation was performed.			
229	Benefit Processing and Calculations	Ability to perform a revised benefit calculation based on newly received information after having released the record for payment but before issuing 1st pension check.			
230	Benefit Processing and Calculations	Ability to update member demographic data with new information during benefit calculation process or direct to different work queue if necessary.			
231	Benefit Processing and Calculations	Ability to verify and/or cross-reference the termination date provided on the retirement application against the termination date transmitted from County HR, and if a discrepancy exists, notify CCCERA end-user.			
232	Benefit Processing and Calculations	Ability to request repayment by member in lump sum or to determine and apply temporary reduction in benefit necessary to recoup the overpayment within user-defined number of months, in case of an overpayment.			
233	Benefit Processing and Calculations	Ability to generate correspondence notifying the member of options available in the event of an adjustment.			
234	Benefit Processing and Calculations	Ability to generate correspondence to retirees.			
235	Benefit Processing and Calculations	Ability to generate correspondence requesting additional documentation to include but not be limited to death certificate, divorce decree, marriage certificate and proof of date of birth of new survivor.			
236	Benefit Processing and Calculations	Ability to add a new individual to pension payroll and transfer information to a reviewer via workflow for an approval step; only after the approval process, officially placing the individual on payroll.			
237	Benefit Processing and Calculations	Ability to automatically calculate Total Payroll transfer amount, total deduction amounts and taxes according to business rules and laws and forward information to appropriate area.			
238	Benefit Processing and Calculations	Ability to automatically determine and apply actuarial reduction to monthly benefit based on prior option selections and other situations.			
239	Benefit Processing and Calculations	Ability to determine date of conversion from service to disability retirement and capture both dates of retirement.			
240	Benefit Processing and Calculations	Ability to provide an online Web utility for CCCERA members to calculate and/or estimate the effects of various federal and state withholding tax amounts.			
241	Benefit Processing and Calculations	Ability to provide an online Web utility for CCCERA members to view and/or print benefit summary information.			
242	Benefit Processing and Calculations	Ability to re-calculate a benefit amount based on a change in personal data.			
243	Benefit Processing and Calculations	Ability to recognize a change to the member's account and trigger a post-retirement adjustment workflow with the ability to have the system perform the re-calculation of benefits and the comparison of benefit amounts.			
244	Benefit Processing and Calculations	Ability to adjust audit percentages or other criteria to include but not be limited to the ID of staff member, employer report accuracy data and staff accuracy for the application of audits without IT intervention.			
245	Benefit Processing and Calculations	Ability to capture reviewer results and statistics and generate appropriate reports.			
246	Benefit Processing and Calculations	Ability to calculate and store benefit information associated with date of retirement and choice of various retirement options for use in future benefit calculations.			
247	Benefit Processing and Calculations	Ability to notify operator of open POS contracts when a retirement is being setup and allow them to optionally continue.			
248	Benefit Processing and Calculations	Ability to produce various reconciliation reports used to reconcile the COLA increase, escalations, etc., and ensure that the overall pension payroll is balanced before any disbursements are issued.			
249	Benefit Processing and Calculations	Ability to support COLA banking in the COLA calculation and posting process.			
250	Benefit Processing and Calculations	Ability to calculate and post both regular and supplemental COLA.			

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251	Benefit Processing and Calculations	Ability to identify, within a COLA pre-process, members who require adjustments and members who have QDROs that may be impacted by COLA or are due COLA.			
252	Benefit Processing and Calculations	Ability to configure COLA banks based on tiers and to view the bank balance at the member COLA bank level.			
253	Benefit Processing and Calculations	Ability to ensure, as adjustments are made during the year, that plan and tier are properly recorded on the transaction.			
254	Benefit Processing and Calculations	Ability for user to maintain the COLA percentage at the tier level.			
255	Benefit Processing and Calculations	Ability to determine and record COLA for cases where there are exceptions that could not be updated by the system.			
256	Benefit Processing and Calculations	Ability to store reasons for not receiving a specific COLA (per account).			
257	Benefit Processing and Calculations	Ability to calculate and post regular COLA and Supplemental COLA based on parameters set within PAS but that may change from year to year.			
258	Benefit Processing and Calculations	Ability to calculate COLA for an individual member.			
259	Benefit Processing and Calculations	Ability to conduct a test run of COLA calculation within the production environment without posting to the members' account and do so without shutting users out of system.			
260	Benefit Processing and Calculations	Ability, in instances where there is a retroactive disability payment and the disability application is settled, to correctly calculate and apply COLA.			
261	Benefit Processing and Calculations	Ability, within a benefit / alternate payee profile established from a post-QDRO, to indicate whether or not the payee should receive COLA and to integrate that in the calculation.			
262	Benefit Processing and Calculations	Ability to display the period to which the calculated COLA applies on the payment register detail screen.			
263	Benefit Processing and Calculations	Ability to display COLA percentage used in transactions displayed online.			
264	Business Rules	Ability to provide "rules management" capabilities.			
265	Business Rules	Ability to implement and maintain business rules external to the application(s) that invoke the rules.			
266	Business Rules	Ability to reuse business rules consistently across sub-systems to include but not be limited to PAS, Workflow, CRM and portal (if not all a part of entire PAS solution).			
267	Business Rules	Ability to modify an existing business rule such that when it is modified the modification is immediately realized in all environments in which the change is made and executable everywhere the rule is used in a specific environment.			
268	Business Rules	Ability to test new or modified business rules externally to any and all applications that may invoke that rule.			
269	Business Rules	A business rule should be testable without testing every instance that invokes the rule.			
270	Business Rules	Ability to perform version control of all Business Rules.			
271	Business Rules	Ability to execute scenarios (transactions in controlled conditions) using previous versions of business rules in support of audit activities, reproduction of historical calculations, etc.			
272	Business Rules	Ability to reuse business rules and/or rule sets to create additional rule sets.			
273	Business Rules	Ability to link business rules to the business process activity(ies) to which they apply.			
274	Business Rules	Ability to specify the effective date of any new or modified business rule, so that it may be implemented ahead of time and take effect at the correct time.			
275	Business Rules	Ability to easily search for a specific business rule in the repository of business rules, using CCCERA defined criteria.			
276	Business Rules	Ability to relate each defined business rule back to the source from which it is derived to include but not be limited to a regulation, law and policy.			
277	Business Rules	Ability to automatically check new or modified rules against all existing business rules for conflicts or duplications.			
278	Call Center	Ability to integrate PAS application with the CCCERA telephone system, using a member unique identifier while in queue so that PAS screen is "primed" with member data when agent actually takes call.			
279	Call Center	Ability to record all or portions of telephone calls and subsequently integrate indexed, recorded .wav files into the member records.			
280	Call Center	Ability to capture typed encounter notes within member record following every phone call or other encounter.			
281	Call Center	Ability to check status of all pending member requests from a simple query.			
282	Call Center	Ability to quickly retrieve all portions of a member record once call is activated at agent's PC to include but not be limited to all previous calls, all recent correspondence, most recent member statement, current refund values, current pensionable salary, complete salary history, total service credit and service credit history.			
283	Call Center	Ability to email substance of a received call to a specific member of staff for them to follow-up on call.			
284	Call Center	Ability to create work item and submit to a workflow system for appropriate routing to a business unit.			
285	Call Center	Ability to provide agents ready access to single comprehensive list of forms, handbooks, etc., to provide immediate fulfillment based on requested means of communication of member requests (including pre-population of fields, etc.)			
286	Call Center	Ability to count and categorize calls, emails and all other incoming requests by topic, by type of caller and produce appropriate reports to include but not be limited to showing disposition, success rate and forecasting.			
287	Correspondence	Ability to report statistics on specific types of form and/or correspondence generated.			
288	Correspondence	Ability to print both blank and/or pre-filled forms and bar-coding information, as appropriate.			
289	Correspondence	Ability to capture annotations on correspondence.			
290	Correspondence	Ability to handle correspondence generation to include but not be limited to end-users generate their own correspondence and print it themselves and also to send it via any communication channel based on recipient's preference as specified in the Member Record.			
291	Correspondence	Ability to generate additional information correspondence when further documentation is needed and/or data is missing.			

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292	Correspondence	Ability to generate automatic reminder correspondence when the specified CCCERA wait period has been exceeded for a response.			
293	Correspondence	Ability to sign correspondence with staff names to include but not be limited to using signature fonts and pasted images.			
294	Correspondence	Ability to customize system generated correspondence using pre-defined templates and any combination of the following capabilities to include but not be limited to: auto-populating (tagged) blank fields with data drawn from a member/ retiree/ beneficiary/ employer account (with the ability to override some fields), auto-population of the appropriate signature, manually selecting different paragraphs based on the input from the user, automatically selecting different paragraphs based on member account information and/or unique situations, and permitting the addition of one or more free-form text paragraphs at any location in the correspondence template - given the appropriate authority to make such changes/insertions.			
295	Correspondence	Ability to maintain and manage the versions of standardized forms, correspondence and reports.			
296	Correspondence	Ability to track, archive and manage all in- and out-bound communication channels as electronic correspondence.			
297	Correspondence	Ability to provide a valid / invalid address checkbox for a person's address and if the address is marked invalid – track all correspondence that should have been sent until a valid address is known and then prompt the user as to which past correspondences should be sent to the new valid address.			
298	Correspondence	Ability to distribute forms initiated via request by workflow, the web portal or any other methods accepted by CCCERA.			
299	Correspondence	Ability to automatically generate "need more information" correspondence			
300	Correspondence	Ability to track the date and the address to which the welcome correspondence and/or enrollment packet were sent to the member.			
301	Correspondence	Ability to support both mandatory and non-mandatory fields on all forms.			
302	Correspondence	Ability to generate member correspondence to explain the following topics, including but not limited to confirmation, timelines and options.			
303	Correspondence	Ability to archive all auto-generated correspondence along with the method of distribution at the same time that it is generated and distributed.			
304	Correspondence	Ability to automatically index correspondence in ECM, when a document is generated.			
305	Correspondence	Ability to automatically generate, transmit and deliver appropriately both individual and mass-produced correspondence.			
306	Correspondence	Ability to support generation of material for and execution of mass mailings to targeted or general audiences.			
307	Correspondence	Ability to retransmit correspondence to members by extracting from the archive (complete with appropriate watermark).			
308	Correspondence	Ability to stop transmission of correspondence sent in error prior to its transmission.			
309	Correspondence	Ability to send a copy of a document originally printed and sent to one address to a different address without changing the address on the original document; recording the event in the member's record.			
310	Correspondence	Ability to accommodate undelivered email as the trigger of an email workflow process for further investigation.			
311	Correspondence	Ability to support CCCERA archiving of copies of all communications sent to members and/or other third parties such that the member is notified to log in to CCCERA web-site to retrieve, view, and optionally download and/or print the communication.			
312	Correspondence	Ability to mask the first five digits of the member SSN with XXX-XX in all correspondence and forms in which the number need not be explicitly printed.			
313	Correspondence	Ability to apply and conform with postal standards and requirements for address formats.			
314	Correspondence	Ability to accept digital signatures.			
315	Correspondence	Ability to create new correspondence templates and/or edit existing correspondence templates.			
316	CRM	Ability to automatically (with a single keystroke or click) retrieve and display all past activity tracking events (aka "encounter notes") that are similar to the member's current request. This may alert the user that the member is perhaps "fishing" for a different CCCERA response to his/her previous inquiry.			
317	CRM	Ability for users to access all information that was historically provided / sent to the member directly from customer service screens.			
318	CRM	Ability to access the member account update screen directly from any member service screen, and update fields including but not limited to preferred address, email address, and phone number.			
319	CRM	Ability to track requests that require CCCERA response and the method for responding including but not limited to phone call, correspondence, or e-mail.			
320	CRM	Ability, when viewing the encounter notes, to sort the information based on various criteria including date/time, CCCERA contact, type of contact, and disposition.			
321	CRM	Ability to fully integrate CRM system with PAS solution, providing a single, unified, consistent user interface and terminology; at least the appearance of a single data repository; consistency of processing such that a process involving a member undertaken within the CRM properly flows through the PAS application and vice-versa.			
322	CRM	Ability to reflect a change made within the CRM system throughout the entire PAS and vice-versa.			
323	CRM	Ability to automatically save, index and retrieve all correspondence or written documents sent to the member.			
324	CRM	Ability to support (in the Contact Management System) tracking of E-mails – both in-bound and out-bound.			
325	CRM	Ability to support (in the Contact Management System) tracking of Faxes – both in-bound and out-bound.			
326	CRM	Ability to support (in the Contact Management System) tracking of eForms – both in-bound and out-bound.			
327	CRM	Ability to support (in the Contact Management System) tracking of Phone Calls – both in-bound and out-bound.			
328	CRM	Ability to interface the CRM application with all proposed office automation applications.			
329	CRM	Ability to integrate the CRM with workflow to initiate a PAS process for a member and track the status of requests.			
330	CRM	Ability to maintain day, week, and month calendars/diary in the CRM/Contact Management System to permit users to schedule future activities, such as a callback to a member who requested information that is typically provided by phone (rather than by a letter or form).			
331	CRM	Calendar activities must be automatically linked to contacts, providing instant access to contacts from the calendar must be supported.			
332	CRM	Ability to provide automated ticklers/reminders to staff member of promised activities and upcoming events.			
333	CRM	Ability to include in the CRM/Contact Management System standard reports (modifiable by the user) and a user-friendly report writer for creating custom reports with graphics, headers, footers, totals, subtotals, sorting, and statistics.			

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334	CRM	Ability to provide in the CRM report writing tools a method of adding new reports to a report menu for easy access.			
335	CRM	Ability to produce reports from the CRM including but not limited to a contact list, all notes and/or all history (chronologically) for a contact or a member contact journal.			
336	CRM	Ability to quickly lookup and provide information to members on frequently asked questions, including but not limited to data on account balances, current address/change of address, beneficiary status or change, benefit calculation, payroll checks/deposit, deductions and processing forms.			
337	CRM	Ability to provide access to all member correspondence with the ability to provide resends/reprints as needed through various media including but not limited to hardcopy, email, portal and USPS.			
338	CRM	Ability to input and maintain multiple-date sensitive addresses.			
339	CRM	Ability to audit (or even prohibit) changes made to member data that are not made as part of an automated workflow process, e.g., a verbally requested change of address, depending on CCCERA management direction.			
340	Death	Ability to suspend account in the event of a contested death benefit.			
341	Death	Ability to automatically stop/hold monthly retirement benefit payment if date of death precedes processing, and record the stop/hold on the account level so that staff processing the account are aware the benefit was not paid.			
342	Death	Ability to identify if a refund application, disability retirement application, or retirement application was filed prior to the member's death, and if so, trigger appropriate workflow (and set the item as high priority).			
343	Death	Ability to capture information from contested death benefit correspondence including but not limited to the name of person contesting death benefit, reason contesting and CCCERA response.			
344	Death	Systematic generation (with ability to override) the designated beneficiaries; conditional workflow routing will occur based on correspondence with CCCERA.			
345	Death	Ability to capture information related to a death notification including but not limited to the date received, date of death, contact person(s) name, address, phone number, relationship to deceased member and death certificate received indicator.			
346	Death	Ability to automatically create a system-generated payment correspondence and corresponding notification to other interested parties.			
347	Death	Ability to determine that benefit checks for the month of death and/or subsequent months were not returned.			
348	Death	Ability to generate an Acknowledgement correspondence when a death notification (and other documents) are received and contact person information is available.			
349	Death	Ability to generate a death benefit overpayment correspondence when applicable.			
350	Death	Ability to generate an Estimated Death Benefit / Active Death correspondence to include the estimated death benefit amount, beneficiary/survivor information, and next steps that are needed to process the benefit payment, etc.			
351	Death	Ability to recognize if contact person information was entered at the time of notification, and if not, automatically generate correspondence to the beneficiary and/or the estate of the deceased requesting contact person information.			
352	Death	Ability to add a beneficiary or other member payee to monthly benefit payroll using a specific benefit amount or percentage derived.			
353	Death	Ability to calculate (or override the calculated amount of) the death benefit (estimated and finalized) for all payment types and store not only the estimated benefit payment calculation information but also the final calculation results, preserving the detailed calculation for future reference. If an override is performed, the transaction must be accompanied by an audit trail including the reason for the override.			
354	Death	Ability to cross-reference a survivor added to payroll and the associated deceased member (e.g., both member and spouse were in the retirement system).			
355	Death	Ability to determine direct rollover eligibility.			
356	Death	Ability to calculate the minimum distribution amount.			
357	Death	Ability to display a check or EFT summary and/or check or EFT detail pertaining to each death benefit payment.			
358	Death	Ability to display appropriate beneficiary information for all beneficiaries including but not limited to last named beneficiaries/survivor on file, associated percentages, identification of multiple beneficiaries and beneficiary's/survivor's relationship to member.			
359	Death	Ability to identify the benefit payment type including but not limited to survivor annuity or return of contributions. This will have been established at the time of member retirement, to route the death benefit work request to the appropriate queue.			
360	Death	Ability to identify where there are multiple payees (e.g., beneficiary, next-of-kin, survivor, etc.) and process separately, tracking the information CCCERA is waiting for from each beneficiary, and authorizing payment to those who have returned all necessary information while holding payment to payees whose information remains incomplete.			
361	Death	Ability to process death benefits according to specific "death in the line of duty" plan provisions, when the member died while on duty.			
362	Death	Ability to re-calculate the death benefit and perform appropriate communication and benefit adjustments when new information is received.			
363	Death	Ability to re-calculate the distribution of the death benefit in the event a beneficiary pre-deceases the member.			
364	Death	Ability to receive notification of death in various ways including but not limited to the Notification of Death form, phone, e-mail, correspondence, and returned check, and standardize the content and automatically trigger an appropriate workflow request.			
365	Death	Ability to reverse a death entered in error; reinstate a payroll record removed in error without interrupting monthly payments or pay the benefit payments that were missed prior to the reversal.			
366	Death	Ability to store a summary transaction of the death events including but not limited to cause of death, payments made, payment amounts and payee for each based on detailed account transactions.			
367	Death	Ability to suspend a specific process and generate a work request of the Death Process for processing.			
368	Death	Ability to interface/support exchange of information with third party sources (i.e., LifeStatus360) that provide death information.			
369	Death	Ability to input death notifications into a member's account so that the information is instantly available to staff working on different levels of the account processes.			
370	Death	Ability to provide automated processes to ensure that the total paid to all beneficiaries is equivalent to the total calculated death benefit, less any member overpayments or amounts due.			

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371	Death	Ability to update beneficiary information after the member's death.			
372	Death	Ability to send correspondence and/or payments to addresses other than those on permanent file, including sending copies of correspondence to multiple recipients.			
373	Death	Ability to automatically process beneficiary payment changes due to retroactive adjustments to a deceased pensioner's account.			
374	Death	Ability to allow all confirmed beneficiaries or survivors who do not yet have accounts with CCCERA to set up a means of electronic communication once their identities and rights have been confirmed, prior to payment of the death benefit.			
375	Death	Ability to automatically exchange information with a third party benefit administrator (such as the notification of death) as part of the death processing.			
376	Death	Ability to automatically terminate a DRO benefit upon the death of the underlying member or the death of a member's survivor.			
377	Death	Ability to return unused contributions as a death benefit.			
378	Death	Ability to track returned benefit checks (in the case of a death); checks are to be returned for the month of death and any issued after the month of death.			
379	Death	Ability to prorate a death benefit payment based on the day of the month when participant deceases			
380	Death	Ability in the case of an ex-spouse / divorce decree to add beneficiaries as a continuance			
381	Death	Ability to track a minor child eligibility for a death benefit and add them to payroll			
382	Death	Ability to process a death benefit enhancement for a minor child and have the system know when to end that benefit			
383	Death	Ability to recalculate a member's benefit based on the death of an ex-spouse or alternate payee			
384	Death	Ability when a member passes away with an eligible spouse and an alternate payee to perform a recalculation of benefit and pay both the eligible spouse and the alternate payee			
385	Death	Ability to recalculate the member's account back to 100% upon the member's death in cases of Social Security offset.			
386	Death	Ability to suspend an alternate payee account on the member's death.			
387	Death	Ability to determine eligibility and amount for death benefits.			
388	Disability	Ability to validate that member is not on pension payroll nor is in the process of applying for retirement when filing for a disability claim.			
389	Disability	Ability to capture the board decision or decisions including but not limited to a denial, disapproval, deferral, or approval of benefits type.			
390	Disability	Ability to capture a denial reason for the disability case.			
391	Disability	Ability to capture and track disability fields for each step in the review including but not limited to benefit adjustment amounts, dates and justifications associated with the adjustment.			
392	Disability	Ability to capture and track fields including status, change in status, date of change in status.			
393	Disability	Ability to capture CCCERA defined information including application type(s) from applications including but not limited to service-connected disability retirement, non-service-connected disability retirement, active death, line-of-duty death, and/or other special legislation.			
394	Disability	Ability to automatically record receipt of documents including but not limited to application for disability retirement, physician's medical report, earnings statement, marital status form, student status form, appeals, and other disability related documents.			
395	Disability	Ability to automatically generate a report, sorted by various fields defined by the CCCERA, identifying disability applications/cases to be presented to the Board of Retirement.			
396	Disability	Ability to automatically generate disability reevaluation form and cover correspondence stating due date for return, to disability retirees.			
397	Disability	Ability to automatically generate disability reevaluation form to disability retirees based on various CCCERA defined triggers, including return to work.			
398	Disability	Ability to automatically generate and send follow-up correspondence regarding non-receipt of disability reevaluation form XX days after the form was sent to the disability retiree.			
399	Disability	Ability to generate a report listing history of appeals to include but not be limited to type of disability, date received, date presented to Board of Retirement, and decision (to include but not be limited to grant, deny, or tabled).			
400	Disability	Ability to generate an application for disability retirement form.			
401	Disability	Ability to generate correspondence to member and employer either denying, disapproving or approving disability or active death benefits, including effective date of retirement (and any other information) as applicable.			
402	Disability	Ability to generate correspondence to member either denying or granting request for appeal.			
403	Disability	Ability to generate correspondence to retiree regarding choice of disability or service retirement showing calculation figures and other CCCERA defined information to assist with the decision.			
404	Disability	Ability to produce various disability denial correspondence including CCCERA defined reasons.			
405	Disability	Ability for organizations including but not limited to physicians, hospitals, and employers to submit disability information remotely from their office via a Web utility.			
406	Disability	Ability to automatically suspend disability benefit payments due to non-receipt by the due date of any required documentation, including but not limited to medical recertification and disability reevaluation form.			
407	Disability	Ability for benefit recipient to view via the web the detail, status, and any required recipient (or employer) action pertaining to any disability application, benefit payment or non-payment.			
408	Disability	Ability to add new disability review status types			
409	Disability	Ability to automatically transfer member from regular service retirement to disability retirement upon approval			
410	Disability	Ability to identify all payments made to disability retirees, sorted or categorized by different fields to include but not be limited to type of disability and length of time on disability.			
411	Disability	Ability to identify disability retirees by disability review status type.			
412	Disability	Ability to identify members, other applicants or employers who have not responded to a CCCERA request for additional medical information, employer questionnaire and risk management.			
413	Disability	Ability to provide a single disability summary screen, containing all information desired by CCCERA users, from a single disability application.			
414	Disability	Ability to restrict access to authorized users only for various sensitive disability and medical information.			

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415	Disability	Ability to retain paper form for the disability cases with the option to image the information and make it available in electronic form for review by staff and physicians.			
416	Disability	Ability to screen for disability retiree and suspend the retiree's benefit(s) in the event the retiree returns to work for a CCCERA employer.			
417	Disability	Ability to validate automatically that member meets the disability eligibility requirements including but not limited to service credit and age.			
418	Disability	Ability to ensure that disability benefit calculations take into account final contributions			
419	Disability	Ability to determine if a member has ever applied for a disability retirement and if so, to assign the new application to member of staff who managed the previous application.			
420	Disability	Ability to determine if a member has applied for a disability hearing, the status of that application, and the result(s) of the hearing(s).			
421	Disability	Ability to capture the cost including but not limited to independent medical examination, cost of medical records, and medical boards for each application.			
422	Disability	Ability for all application types to count and report on various fields including but not limited to application types, hearing types and the decision types.			
423	Disability	Ability to capture the data to subsequently, respond quickly to FOI requests about characteristics including but not limited to disability applications, disability applicants and doctors.			
424	Disability	Ability to provide a flexible application process to accommodate new legislation and dynamically add new plans, relating them to the section of the law that governs.			
425	Disability	Ability to respond to results of a hearing and take appropriate further actions including but not limited to reopening the application and calculating the benefit.			
426	Disability	Ability to create a process that manages the disability-related records acquisition subpoena process for records including but not limited to medical and employer.			
427	Disability	Ability to generate benefits due for all types of disability retirement types			
428	Disability	Ability to automatically calculate, track, and report on labor code (4850.4) payments			
429	Disability	Ability to export data from PAS relative to the status of disability applications to assemble various board reports.			
430	Disability	Ability to track the expiration date of the "Medical Release Authorization" form and generate correspondence to applicant so it can be requested / renewed.			
431	Disability	Ability to identify a member on a Disability retirement under the age of 55 and generate correspondence / perform outreach to the employer regarding reemployment in that position; and then generate correspondence to the member to setup a medical reevaluation.			
432	Employer Reporting	Ability to match employer report to employer remittances and alert employer to any mismatches.			
433	Employer Reporting	Ability to prevent invalid or duplicate data from posting to the member's account.			
434	Employer Reporting	Ability to compare a member's current month salary and hours to preceding months and identifying, by employer, instances where the information submitted violates CCCERA business rules including but not limited to salary exceeds an acceptable parameter; no salary reported; no hours reported but required for plan and communicate these errors back to employer.			
435	Employer Reporting	Ability to provide an audit trail of any adjustments in salary, contributions, or service made to a member's account, including the ability to detail a member's salary, contributions, and service by employer throughout the system and the member's history.			
436	Employer Reporting	Ability to capture a member's hire date or termination date from employer reports.			
437	Employer Reporting	Ability to capture employer demographic information, including the CCCERA-assigned employer number, employer name, multiple contacts, multiple addresses, multiple e-mail addresses, and other pertinent information.			
438	Employer Reporting	Ability to capture historical rates and factors with effective dates so that retroactive calculations use the appropriate figures.			
439	Employer Reporting	Ability to capture user-defined rules to validate employer data.			
440	Employer Reporting	Ability to capture, track, and report member personnel status codes including but not limited to Hire Date, Re-Hire, Leave Without Pay, Terminate and Suspension from employer reports (as well as "manual" user input); must include capture and tracking of status code start / end dates.			
441	Employer Reporting	Ability to automatically generate a report identifying the employer reports received, employer reports not received, dates when employer reports were received, amounts received and any \$ differences due; automatically notify one or more contacts within an the agency that the report is available and can be viewed on-line.			
442	Employer Reporting	Ability to generate correspondence to employer regarding any adjustment made by CCCERA staff to salary, contributions, or service.			
443	Employer Reporting	Ability to generate a report of the status of receivables for employee and employer contributions on demand, available to both CCCERA staff and to employers.			
444	Employer Reporting	Ability to generate a report presenting summaries of exceptions (unprocessed entries) for each employer that will need to be corrected, including the ability to re-generate the report after corrections have been made.			
445	Employer Reporting	Ability to accept positive or negative adjustment transactions received on an employer's wage and contribution report, and to automatically take appropriate action in the case of a negative result.			
446	Employer Reporting	Ability to post (when there are individual records with errors) all the validated member records and suspend those member records containing errors and generate a report and save for later repair; OR ability to capture changeable threshold parameters based on the number of errors encountered; X records with errors prevents posting of the entire report; Y prevents only erroneous records from posting; a user (not programmer) maintained parameter is required.			
447	Employer Reporting	Ability to accommodate employer-reported data adjustments to prior periods as well as information for the current period			
448	Employer Reporting	Ability to accommodate multiple employment status codes including but not limited to full-time salary or full-time hourly for a member employed by one employer or multiple departments.			
449	Employer Reporting	Ability to accommodate those cases where the employer reports adjustments for specific individuals and identify the period for which it is for and have the system flag and/or adjust those identified periods.			
450	Employer Reporting	Ability to apply deduction identified in the wage and contribution report against predefined purchase of service balances and pro-rate credit accordingly.			

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451	Employer Reporting	Ability to assign an "effective" period(s) to employer submitted data.			
452	Employer Reporting	Ability to automatically calculate the contribution that is due from the employer by contribution type and by plan type and provide a summary of amounts due by each type identified.			
453	Employer Reporting	Ability to automatically create appropriate general ledger transactions for employer payment receipts including but not limited to monthly remittance of contributions and disbursements including refunds of employer overpayments.			
454	Employer Reporting	Ability to automatically trigger appropriate workflow if an employer reported adjustment is received for someone who has terminated/refunded (to address any overpayment / underpayment of refund).			
455	Employer Reporting	Ability to classify employer data errors according to their severity (with posting of data permitted for less severe conditions, but posting suspended for critical errors).			
456	Employer Reporting	Ability to correct all employer-reported data by manual entry, providing an audit trail of all such corrections.			
457	Employer Reporting	Ability to create and delete individual records within the employer data file; subject to CCCERA internal audit controls and limited to specific users.			
458	Employer Reporting	Ability to create appropriate general ledger debit and credit memos for differences and corrections in employer reports.			
459	Employer Reporting	Ability to display any adjustment made in employee's salary, contributions, and service, and display those adjustments at both the summary level and the detailed transaction level.			
460	Employer Reporting	Ability to maintain year-to-date balances of total employer and employee contributions for each employer.			
461	Employer Reporting	Ability to provide a real-time processing, validation, and error reporting of employer reports including real-time summary, reconciliation, and out-of-balance notifications of any data file received from an employer, including data file totals and number of detail records.			
462	Employer Reporting	Ability to provide appropriate validations to ensure that reported service is consistent with reported salary and contributions, and that all are properly posted to the member's account.			
463	Employer Reporting	Ability to provide front-end validations including but not limited to SSNs, agency numbers, duplicate names, blank fields, negative numbers and dates.			
464	Employer Reporting	Ability to provide front-end validations to determine whether reporting dates have already been posted on a member level, and if so, alert user to investigate.			
465	Employer Reporting	Ability to reconcile the total amount of member contributions and employer portions plus any adjustments to the total remittance made by the employer.			
466	Employer Reporting	Ability to re-execute data validations and re-calculate data file totals after a correction is made or records have been created or deleted, subject to CCCERA internal audit controls.			
467	Employer Reporting	Ability to retrieve and review prior wage and contribution reports as reported by the employer including the means and media by which it was reported.			
468	Employer Reporting	Ability to reverse the processing of wage and contribution reports that were submitted by an employer in error.			
469	Employer Reporting	Ability to support "multiple" fully defined and structured reporting formats since CCCERA employers have different payroll systems and consolidating them into a single format may not be feasible.			
470	Employer Reporting	Ability to support the lowest level of detail in the member account based on various employer reporting frequencies - CCCERA employers report monthly.			
471	Employer Reporting	Ability to tie contributions posted to the system to a contribution period ending date and update employee salary history for the appropriate month and year.			
472	Employer Reporting	Ability to validate and post service credit if member salary and contributions are reported.			
473	Employer Reporting	Ability to validate reported data against tables of employer and employee contribution rates based on matching the contribution ending date with the effective date of the contribution rate.			
474	Employer Reporting	Ability to capture statistics about employer error and warning rates, to analyze trends and to share with employers.			
475	Employer Reporting	Ability to maintain a payment schedule unique to each employer that can be used to automatically generate follow-up notices to delinquent employers, create reports, etc., and ability to accept other unscheduled payments			
476	Employer Reporting	Ability to automatically evaluate structure compliance of the transmittal file uploaded by the employer and reject it with an indication of the cause in the event it is not in compliance.			
477	Employer Reporting	Ability to report and record job position, union code and bargaining unit from the transmittal file.			
478	Employer Reporting	Ability to generate penalty and/or interest correspondence to employers based on late report / late remittance.			
479	Employer Reporting	Ability to push messages out to employer to draw them back to the employer self-service site.			
480	Employer Reporting	Ability to provide fully Web-enabled employer "self-service" in submitting data, receiving feedback on the validity of that data, and making needed corrections.			
481	Employer Reporting	Ability to define period and non-applicability of annual compensation limits by employer, tier and membership date.			
482	Employer Reporting	Ability to indicate / certify the validity of the information submitted by the employer to CCCERA			
483	Enrollment	Ability to identify duplicate names with the same or similar SSN and/or date of birth for staff intervention/validation.			
484	Enrollment	Automatically generate correspondence to the member requesting verification of SSN and/or date of birth.			
485	Enrollment	Ability to capture the enrollment of new employees as a result of having been reported on the employer's Wage and contribution report, distinguishing them from those reported who are not (and will not become) members as well as those returning to service, returning from a furlough, or returning from a leave of absence.			
486	Enrollment	Ability to communicate all errors on enrollment entries in "real-time" and edit / validate the provided corrections in "real-time".			
487	Enrollment	Ability to validate incoming data formats from County Employer(s), including but not limited to numeric, field size, physical file attributes and required fields.			
488	Enrollment	Ability to generate correspondence for the approval of membership eligibility with distribution to both the employee and employer.			
489	Enrollment	Ability to generate a report of all members without a beneficiary form / nomination on file and perform appropriate follow-up automatically.			
490	Enrollment	Ability for the County Employer(s) data feed and/or CCCERA staff to create, update, and display demographic and enrollment information			
491	Enrollment	Ability to assign and continue to use an established unique employee ID number (i.e., Mkey, Employee Number, etc.) for members.			

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492	Enrollment	Ability to assign / associate / validate members to their appropriate employer, retirement tier, corresponding contribution rate, job title, etc. based on eligibility rules.			
493	Enrollment	Ability to automatically set up a Web account for a new member and therefore provide access to his/her account via the Web through use of the CCCERA chosen security facility upon successful member enrollment.			
494	Enrollment	Ability to pre-fill the corresponding city and state after the zip code is entered			
495	Enrollment	Ability to support different enrollment rules pertaining to different time periods and to accommodate members who are part of a prior tier based on those rules.			
496	Enrollment	Ability to track information regarding the member's classification, job code or union within the plan.			
497	Enrollment	Ability, upon enrolling a member who has the "same" SSN as an existing member, to correct any existing errors and enroll the new member.			
498	Enrollment	Ability to "enroll" new members who have been named in a QDRO, Domestic partnership, or court order; and flag the record, so that additional information can be added to their account.			
499	Enrollment	Ability to query against enrollment data for ad hoc queries.			
500	Enrollment	Ability to adjust entry date, plan (tier) and age of entry for deferred members who have returned to work, while still retaining historical information.			
501	Enrollment	Ability for CCCERA staff to generate a Pin / Password which allows a new member portal account to be authenticated and activated by the member.			
502	Enrollment	Ability for an employer to enroll a new employee, or reactivate a deferred employee, via transmittal files submitted on the employer portal.			
503	Funds Management	Ability to ensure that at all times CCCERA manual and computerized records, subsidiary ledgers, control ledger, and reconciled bank balance are in agreement			
504	Funds Management	Ability to provide a listing of all automatic computer generated entries against the general ledger, such that a CCCERA staff member can successfully identify the source of every automated general ledger entry			
505	Funds Management	Ability to integrate with any services provided by CCCERA banking supplier to permit remote deposit of payments received			
506	Funds Management	Ability to ensure that if one of CCCERA business areas enters a cash receipt then another CCCERA business area cannot enter the same cash receipt			
507	Funds Management	Ability to process any payments received on the day of receipt - even if no specific "receivable" yet exists against which to credit the payment. Such processing would require creation of a follow-up workflow item to resolve the ambiguity			
508	Funds Management	Ability to provide various controls to ensure accuracy, as an example: ensure that money already entered for a given entity, for a specific time period cannot be re-entered, etc.			
509	Funds Management	Ability to provide various reconciliation controls to ensure that last month's fund balance plus any activity during the month equals this month's fund balance			
510	Funds Management	Ability to capture a user-defined parameter for each employer as to whether or not to post out-of-sequence cash receipts.			
511	Funds Management	Ability to capture both member and employer cash receipts data at the plan level, with the ability to roll-up as necessary			
512	Funds Management	Ability to capture cash receipt information and remittance type, whether via ACH, wire transfer, check, etc.			
513	Funds Management	Ability to capture employer remittance cash receipt date (defaulted to today's date) and contribution month-end report date			
514	Funds Management	Ability to capture payment frequency for each employer so that the system can track all reporting dates (not just the last reporting date) to ensure that a contribution month has not been missed			
515	Funds Management	Ability to import a file from the bank containing recent transactions and balances including all deposits regardless of method (e.g., teller, ACH, wire transfer) as well as payment status (e.g., cleared, suspended, open)			
516	Funds Management	Ability to extract statistical data to analyze or project trends			
517	Funds Management	Ability to automatically generate appropriate collection correspondence for payables and/or receivables			
518	Funds Management	Ability to generate a Fund Transfer Reconciliation, i.e., a listing of any funds that may have been transferred from one account to another			
519	Funds Management	Ability to generate a GL Mapping Report, i.e., a report / matrix listing the line-of-business transactions and their corresponding GL transaction			
520	Funds Management	Ability to generate a report of projected funding requirements for the next month to ensure that adequate funds are available in the appropriate CCCERA accounts			
521	Funds Management	Ability to maintain and generate data and information per CCCERA specifications that can be used to produce the CAFR / PAFR report			
522	Funds Management	Ability to generate correspondence and/or e-mails to members notifying them of stop payment			
523	Funds Management	Ability to generate report based on CCCERA frequency relating to the collection and disbursement of PAS related funds			
524	Funds Management	Ability to generate report of employer overpayments and underpayments, both daily and on an as-requested basis			
525	Funds Management	Ability to produce a report (user-defined period: e.g., daily) notifying the Treasury of ACH-related concerns/issues, including any stop payments that need to be authorized			
526	Funds Management	Ability to produce various reconciliation reports with enough detail to accurately reconcile the payments made and cash received			
527	Funds Management	Ability to provide a monthly report of the projected total benefit payments for the next month for each plan, including withdrawals, death benefits, disability benefits, and monthly retirement payments			
528	Funds Management	Ability to provide adequate reconciliation reports to help end-users verify the transactions processed, including daily, weekly, monthly and fiscal year reconciliations			
529	Funds Management	Ability to provide on demand a report of the total contributions received that have not been posted to pension system accounts			
530	Funds Management	Ability to default the cash receipt transaction date to today's date (to eliminate need for user entry in most cases)			
531	Funds Management	Ability to accommodate for General Ledger the addition, modification, closing and deletion of plans such that duplicate data entry is not required			
532	Funds Management	Ability to define new transaction types at the user-level via a table driven parameter and ensure that they are appropriately applied throughout the application and GL			
533	Funds Management	Ability to automatically (at the time a member retires) transfer the member's account balance from the appropriate member-related GL account to the appropriate pension-related GL account			

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534	Funds Management	Ability to process interest on a semi-annual basis and in cases where there is a prior period adjustment; automatically recalculate the interest owed taking into consideration the prior period adjustment.			
535	Funds Management	Ability to run the interest posting process on a per-individual basis due to various timing issues			
536	Funds Management	Ability to adhere to Governmental Accounting Standards Board (GASB) statements and Generally Accepted Accounting Principles (GAAP)			
537	Funds Management	Ability to adjust an account to prevent out-of-balance conditions including a reason code and an explanation of historical transactions			
538	Funds Management	Ability to automatically match funds received to the correct employee or employer account			
539	Funds Management	Ability to capture and maintain contribution rates by group and tier within the retirement system			
540	Funds Management	Ability for authorized staff to capture and maintain interest rate tables (i.e., purchase of service, member account interest, etc.)			
541	Funds Management	Ability to record that a check received from a member has insufficient funds and take corrective business actions			
542	Funds Management	Ability to distinguish cash versus non-cash financial transactions (i.e., interest, miscellaneous credits to member's account, etc.)			
543	Funds Management	Ability to distribute incoming funds to more than one receivable record for the same member if appropriate			
544	Funds Management	Ability to automatically ensure, for all funds, that member and employer reserves as indicated in the (PAS) pension solution database are continuously in agreement with the general ledger reserve balances for same - and to automatically initiate appropriate action if not			
545	Funds Management	Ability to interface with CCCERA accounting package to export transaction detail to the GL in sufficient detail such that all deductions are accommodated (i.e., pension benefits "gross to net")			
546	Funds Management	Ability to identify those customers that are eligible for account interest posting, automatically calculate, and apply interest accordingly (e.g., monthly, annually) according to plan provisions			
547	Funds Management	Ability to initiate a cash receipt investigation process if incoming funds are received and a receivable does not exist			
548	Funds Management	Ability for authorized staff to interface to the existing chart of accounts with sufficient flexibility to maintain that interface should the chart of accounts change and to allow for the parameterized creation of new systems, funds, plans, etc.			
549	Funds Management	Ability to match cash receipt information relating to incoming funds with corresponding receivable records			
550	Funds Management	Ability to process cash receipts resulting from the reversal of a disbursement			
551	Funds Management	Ability to process receipts (cash, checks, etc.) from both organizations and individuals			
552	Funds Management	Ability to provide a detailed history of all transactions processed			
553	Funds Management	Ability to provide fully automated bank account reconciliation functionality, including provision of user-friendly error reports and indication of out-of-balance conditions at a detailed level (i.e., at a sufficiently detailed level so that the user does not need to research where, within a "rolled-up number", a discrepancy exists)			
554	Funds Management	Ability to query on financial transactions based on SSN, payment types (including personal checks), check number, etc.			
555	Funds Management	Ability to support a defined date format and ensure the consistent synchronization of various dates (business date, transaction date, effective date, etc.) between the PAS and GL systems			
556	Funds Management	Ability to support all CCCERA systems / plans and all of their accounting funds, journals, chart of accounts, general ledger (GL) transactions, etc.			
557	Funds Management	Ability to support the processing / posting of a collection of GL transactions			
558	Funds Management	Ability to support the existing Treasury / bank rules, procedures, codes in use, etc.			
559	Funds Management	Ability to suspend interest accrual for members who are inactive			
560	Funds Management	Ability to automatically increment the cash receipt batch number each day			
561	Funds Management	Ability to change compounding frequency (e.g. daily, monthly, quarterly, annually, etc.); currently performed semi-annually; interest compounding frequency must be table driven and authorized user updateable			
562	Funds Management	Ability to prevent or have security controls in the case of issuing a refund to a member or employer that is in excess of their current account balance.			
563	Funds Management	Ability to provide an export process to the CCCERA accounting package that will produce a data file in a format compatible with the accounting system and shall not require any manual alteration of the file (e.g., opening the file in Excel and changing values therein)			
564	Funds Management	Ability to prevent the system from unintentionally exporting the same transactions to the accounting system more than once while not precluding the operator from exporting the data again to replace a corrupted export file			
565	Funds Management	Ability to track transactions exported to the accounting system back to the source transaction(s) through an extract date, a batch number or other relevant identifier.			
566	Funds Management	Ability to adjust and reverse any/all transactions generating appropriate audit trail information being generated			
567	Funds Management	Ability to ensure that no zero or negative checks are issued			
568	Funds Management	Ability to map transactions to the appropriate fund in the general ledger system and update fund names with synchronization across systems			
569	Funds Management	Ability to process and amortize annual "pre-payments" received from Employers for Employer Contributions			
570	Funds Management	Ability to notify CCCERA staff if funds are received for a member and there active member account has been "closed" or converted due to either a refund or retirement			
571	Funds Management	Ability to ensure that payments generated from the system use the correct check date / payment date. Example: some payments made on 2/18/20 should display 2/18/20; whereas other payments produced on 2/18/20 may need to display 3/1/20.			
572	Funds Management	Ability to process Notification of Change (NOC) reports received from Banks and correct data in the PAS accordingly.			
573	Funds Management	Ability to process ACH Rejects received from Banks and correct data in the PAS accordingly.			
574	General	Ability to enable CCCERA staff to perform all of their current duties; such as calculation of member retirement estimates, employee contribution and benefits, maintaining wage and contribution information, maintaining service credit information, processing requests for information, contribution refunds, refund buybacks, purchase of service credit, withholding of health insurance premiums, related financial reconciliation and integration, and actual retirements (i.e., including but not limited to researching / reviewing the member's service credits and wage and contribution history, calculating benefits, setting forth retirement options, adding the member to the benefit payment capability)			

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575	General	Ability to provide secure remote / Web access to the line-of-business system for any out-of-office work to include but not be limited to counseling sessions, seminars and workshops.			
576	General	Ability to automatically generate correspondence to the sender acknowledging receipt of form or document (but not necessarily acceptance).			
577	General	Ability to track the distribution, turn-around, and processing of each document used in any transaction processing.			
578	General	Ability to enforce edits on addresses based on postal regulations and have those edits prompt users to follow the standard prior to successful update.			
579	General	Ability to provide end-to-end performance monitoring and control.			
580	General	Ability to capture manual notes at a variety of levels within the database structure to include but not be limited to member and workflow work items.			
581	General	Ability to provide adequate security as defined by CCCERA			
582	General	Ability to display basic member information on all applicable application screens and have the information displayed in various text cases and styles as required by CCCERA.			
583	General	Ability to display monetary amounts in whole dollars or dollars and cents and the flexibility to perform rounding.			
584	General	Ability to support screen prints for all windows			
585	General	Ability to add a new tier to the system and to modify and/or delete an existing tier from the system.			
586	General	Ability to allow for varying data structures for name and address, based upon the CCCERA defined business need for that information and the type of correspondence to be generated.			
587	General	Ability to allow members and/or affiliates to access their account data via a Web utility.			
588	General	Ability to comply with all applicable external rules and regulations that are defined during the project period as defined by the contract.			
589	General	Ability to comply with all applicable federal and state tax laws and statutes.			
590	General	Ability to have and maintain (add, edit and delete using a simple, universal, consistent interface) table driven parameter values with date sensitive and versioning capability along with the ability to maintain pre-defined value lists such as cities, employer codes, table-values (i.e. tax tables, service credit factors, interest rates, etc.) that are more complex than simple list-values, etc.; the system should be table driven to the maximum extent possible; therefore, tables which contain lists of valid values are to be maintained by a single common interface			
591	General	Ability to maintain holiday, payroll and closing calendars for processes.			
592	General	Ability to match entered data with database values without regard to case – a system that is NOT case-sensitive.			
593	General	Ability to navigate through screens based on standard Windows and/or Browser based navigation.			
594	General	Ability to navigate through screens using Hot Keys and retain the key identifier throughout.			
595	General	Ability to prevent the entry of duplicate transactions, when appropriate.			
596	General	Ability to process business transactions and display information in a concise and consolidated manner so as to avoid end-users from having to access numerous screens in order to accomplish their business task.			
597	General	Ability to provide a common error handling mechanism to include but not be limited to error correction, recovery processing and related quality control procedures and processes.			
598	General	Ability to query and print the history of all changes to include but not be limited to showing before and after values, the date of when the change was made and by whom.			
599	General	Ability to size and adjust all screens and have the settings saved at the workstation level so end-users can display and/or position screens based on business needs.			
600	General	Ability to store, retrieve, and print all parameters used for calculations and corresponding results for all calculations.			
601	General	Ability to support name in distinct components to include but not be limited to title, first, middle, last and suffix.			
602	General	Ability to support various error level severities to include but not be limited to informational, warning, critical and fatal.			
603	General	Ability to support various types of transaction and status codes throughout the system.			
604	General	Ability to use partial field values and/or wild cards for lookups in key fields.			
605	General	Ability to capture, maintain, inquire and display multiple transactions of the same type with effective dates.			
606	General	Ability to support multiple phone numbers that are date and time sensitive (such as using effective and discarded dates).			
607	General	Ability to add, update, delete international and domestic addresses (while utilizing effective dates to maintain a history).			
608	General	Ability to accommodate (store and apply) future demographic changes, all with effective dates, as well as search on historic values.			
609	General	Ability to identify and track the status of all people and/or entities in the database to include but not be limited to vested, active, deferred, deferred vested, retired and beneficiary.			
610	General	Ability to search on various data (key fields) to include but not be limited to Social Security Number, employee id (EID) and/or name.			
611	General	Ability to reprint and/or resend any correspondence on an as needed individual basis in any available format.			
612	General	Ability to perform and communicate real-time validations and the return of entry errors on ALL user and external customer interfaces.			
613	General	Ability to provide context specific "help text" at the screen element, field, or control level of the application in the form of a "tip," as well as text that offers assistance to the user in answering "What do I do here?" Text should be accessible by hovering over or right-clicking on the element (must be ADA-compliant)			
614	General	Ability to provide tools and methods for maintaining version control of on-line help.			
615	General	Ability to allow CCCERA to maintain their own updates, additions and deletions to all forms of on-line help, including the context-sensitive form and the on-line tutorials.			
616	General	Ability to include on-line help and an area for frequently asked questions on employer and member web self service screens and processes.			
617	General	Ability to create wizards that guide the user/member through the completion of any screen or process.			
618	General	Ability to validate input using only valid field values.			

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619	General	Ability to provide business area-specific, generally accessible calendaring capability; managing resources, availability, etc., and generating appropriate triggers/reminders.			
620	General	Ability to support adequate field lengths in all database fields.			
621	General	Ability to define flags (i.e., flex-fields) that can be applied to member accounts to indicate different situations to include but not be limited to the existence of a QDRO in this account, VIP whose record is to have restricted handling, etc.			
622	General	Ability to produce a report of all members whose accounts are flagged with one or more flags.			
623	General	Ability to indicate the existence of a flag on a member account on all member displays.			
624	General	Ability to accommodate alternative naming conventions to include but not be limited to hyphenated names, special characters and single name.			
625	General	Ability to impose and enforce tighter constraints on data entry (e.g. on dollar values and dates) to ensure all transactions are in balance at time of entry so as to eliminate or minimize the effort in identifying errors when calculating interest.			
626	General	Ability to have the system automatically record when a correspondent was generated for a member and keep a running log of what correspondence has been created.			
627	General	Ability to accept multiple transactions of either the same type or different that occur on the same day.			
628	General	Ability for the system to perform regardless of browser.			
629	General	Ability to send customized system notifications to CCCERA users and/or Portal users as needed.			
630	General	Ability to send automated system notifications to CCCERA users and/or Portal users due to system interruptions.			
631	General	Ability to setup, load and maintain generational mortality tables.			
632	Hearing Administration	Ability to capture a member's request for an appeal.			
633	Hearing Administration	Ability to capture hearing documents, decision, etc.			
634	Hearing Administration	Ability to generate "fact sheet" based on the system's history of disability events relating to a particular member to be used for appeal presentation / litigation.			
635	Hearing Administration	Ability to generate a report identifying appeals that were not requested or responded to within CCCERA defined timeframes.			
636	Hearing Administration	Ability to generate appeal Acknowledgement communications to the member and the employer.			
637	Hearing Administration	Ability to generate communications to pertinent parties requesting additional information.			
638	Hearing Administration	Ability to provide authorized parties with secure electronic access to hearing administration and appeal data.			
639	Hearing Administration	Ability to generate ad hoc reports on all hearings and all data associated with any of those hearings to include but not be limited to status, hearing officer, location and hearing type.			
640	Hearing Administration	Ability to schedule a hearing date via Outlook and coordinate with the PAS system for scheduling, correspondence delivery, etc.			
641	Hearing Administration	Ability to automate the submission and processing of new evidence into an existing appeal.			
642	Hearing Administration	Ability to automate the process of updating the necessary member data as a result of a successful appeal.			
643	Hearing Administration	Ability to limit editing of hearing administration and appeal documentation to authorized persons.			
644	Hearing Administration	Ability to capture and maintain individual user notes throughout the hearing administration and appeal process.			
645	Hearing Administration	Ability to ensure all documents and notes related to the hearing administration and appeals process can be properly secured and noted as client-attorney privileged.			
646	Hearing Administration	Ability to automate the process of identifying and notifying staff of all prior cases associated with a specific member.			
647	Hearing Administration	Ability to generate a database of decisions from previous cases.			
648	Hearing Administration	Ability to configure and generate management reports for all or a portion of open or completed disability cases to aid in progression of cases through the disability application and hearings and appeals process.			
649	Hearing Administration	Ability to search for text across multiple entities (e.g. members, employers, third party contacts).			
650	Imaging	Ability to accommodate returned mail as one of the imaging document types and to trigger a returned mail workflow process based on CCCERA defined parameters.			
651	Imaging	Ability to use an electronic form for 3rd party entry of data and upon submission of the completed form, to capture an "image" of the form into the correspondence archive as if the form had been submitted on paper (including the ability to retrieve and print same)			
652	Imaging	Ability to audit the imaging process to ensure that all documents contained in a batch get scanned and indexed only once.			
653	Imaging	Ability to automatically route and send unknown or illegible document types to an investigation queue for resolution without suspending the entire batch.			
654	Imaging	Ability to capture, display, and print metrics on accuracy of individual steps within the image acquisition process to include but not be limited to throughput and indexing.			
655	Imaging	Ability to preview and verify indexed documents prior to the committal and/or update to the imaging system.			
656	Imaging	Ability to receive the Scan Date index from the imaging system for various business processes' date logic and/or edits.			
657	Imaging	Ability to group documents into like batches for scanning based on document properties to include but not be limited to document size, document type, color, and orientation; or to group documents into like batches based on member or retiree and/or pensioner properties to include but not be limited to SSN and Member ID.			
658	Imaging	Ability to add annotations to images to include but not be limited to highlighter, sticky notes, redact, digital stamp, watermark, date stamping, and shapes.			
659	Imaging	Ability to attach a separate file to the imaged document for additional clarification / explanation related to that image.			
660	Imaging	Ability to automatically assign a unique batch number and batch name standard, according to a CCCERA defined standard.			
661	Imaging	Ability to automatically identify and eliminate blank pages within the batch during document scanning and indexing.			
662	Imaging	Ability to automatically recall the last set of index attributes used for cases where all documents in a batch belong to the same person and/or document type.			
663	Imaging	Ability to ensure that multiple users are prevented from selecting and indexing the same batch.			
664	Imaging	Ability to format the data entered from Web Self-Service into a CCCERA defined standard template so that it can be stored as an image in the imaging system for historical reference.			
665	Imaging	Ability to manage the imaging of generated correspondence whether generated online by CCCERA users or from bulk processing.			
666	Imaging	Ability to index a single page, a single document, or a set of documents.			

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667	Imaging	Ability to manage scanning simultaneously with multiple industry-standard scanners.			
668	Imaging	Ability to perform re-scans of a single page, single document or all documents in a batch.			
669	Imaging	Ability to represent a multi-page document as a single document within the imaging archive.			
670	Imaging	Ability to scan both single-sided and double-sided documents.			
671	Imaging	Ability to scan color paper and save as a white document with black text.			
672	Imaging	Ability to perform automatic form and document recognition and auto population of data into the workflow and/or pension application using confidence levels and thresholds.			
673	Imaging	Ability to read 1 dimensional and 2 dimensional Bar Codes and perform optical character recognition of the Bar Code to assist in validation and verification.			
674	Imaging	Ability to export images into multiple standard image formats.			
675	Imaging	Ability to identify documents printed from the imaging system to include but not be limited to a watermark and/or annotation.			
676	Imaging	Ability to allow authorized users to change specific index values of any imaged document with full auditing.			
677	Imaging	Ability to extract and/or print a single page or range of pages within an imaged document.			
678	Imaging	Ability to extract and/or print a summary of query results against the imaging database.			
679	Imaging	Ability to extract and/or print an entire set of archived documents			
680	Imaging	Ability to print annotations superimposed on image as well as to print without annotations.			
681	Imaging	Ability to extract and/or print search criteria and query results against the imaging database.			
682	Imaging	Ability to extract and/or print selected documents of any format from the query results list without opening the documents individually.			
683	Imaging	Ability to manage CCCERA defined user security features that control whether a given user can print documents.			
684	Imaging	Ability to route output from the imaging system to any printer on the CCCERA network or installed on a PC.			
685	Imaging	Ability to perform full page browsing through a member's document, a set of a member's documents, or all of a member's documents from any starting point.			
686	Imaging	Ability for integration of the imaging retrieval and viewing capability with PAS member screens so that any user looking at member data in the PAS solution can retrieve and view member-related documents in a seamless, integrated manner without having to provide retrieval keys into the imaging system a second time			
687	Imaging	Ability to support the existing imaging indices used by CCCERA.			
688	Imaging	Ability for the system to query based on standard criteria.			
689	Imaging	Ability to allow a document to be viewed by more than one user concurrently.			
690	Imaging	Ability to apply further search criteria to the results of a search.			
691	Imaging	Ability to browse from page to page.			
692	Imaging	Ability to compare two documents side by side.			
693	Imaging	Ability to create and distribute pre-defined search templates for multiple users.			
694	Imaging	Ability to move either a single page or multiple pages from one image and/or account to another with full auditing.			
695	Imaging	Ability to reorganize pages in a multi-page or multi-image file at any time, with full auditing.			
696	Imaging	Ability to enlarge specific areas of an electronic file.			
697	Imaging	Ability to jump directly to sections of a document to include but not be limited to the first page, last page, previous page, next page or a specific page of a document.			
698	Imaging	Ability to inform the user that a search is being processed by displaying the percentage of completion.			
699	Imaging	Ability to modify stored searches and/or templates.			
700	Imaging	Ability to overlap documents for comparison.			
701	Imaging	Ability to combine words and phrases using the words AND, OR and NOT to limit, widen, or define a search.			
702	Imaging	Ability to perform range searches for dates and numbers that are indexed.			
703	Imaging	Ability to provide an image viewing and record locking mechanism to allow multiple users to view an image at the same time, allowing only one user at a time to modify an image.			
704	Imaging	Ability to recall user settings for viewing across documents and user sessions.			
705	Imaging	Ability to rotate then save a single page in a two-sided document.			
706	Imaging	Ability to search on date variations (e.g., using 7/1/2020 or 07-01-2020, or July 1, 2020 should all work and all provide the same result)			
707	Imaging	Ability to search using special characters as literals in the search string.			
708	Imaging	Ability to open documents using the appropriate page orientation, without user intervention.			
709	Imaging	Ability to temporarily store all search queries in a particular search session until the sets are released or the session ended by the user.			
710	Imaging	Ability to view sheets of correspondence, legal size and non-standard-sized documents.			
711	Imaging	Ability to view various document and/or image formats to include but not be limited to ASCII, BMP, GIF, HTML, JPEG, PDF, RTF, TIFF, XML and Microsoft Office documents.			
712	Imaging	Ability to simultaneously view thumbnail sketches of multiple documents and multiple pages in a single document allowing users to browse rapidly through pages.			
713	Imaging	Ability to display the first 100 records with any search that exceeds 5 seconds, notify the user that only the first 100 were displayed, and then prompt the user with the following options: 1 Cancel or 2 Refine search or 3 Continue for another 100 records			
714	Imaging	Ability to sort images within categories to include but not be limited to by document name, date range or index fields.			
715	Imaging	Ability to create an electronic, temporary image account record for individuals upon the first receipt of a document, especially when there may not be a member record in the PAS solution or CCCERA is unaware of the identity of the individual.			
716	Imaging	Ability to automatically assign a scanned document to the correct member's electronic folder based on various combinations to include but not be limited to a unique member identifier, the member name, the member DOB, and the member SSN.			

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717	Imaging	Ability to move one or a set of documents from one member's folder to another and update the indexes accordingly, with full audit tracking.			
718	Imaging	Ability to merge two individuals' imaged member folders into a single consolidated folder with full auditing.			
719	Imaging	Integration of the imaging system into the PAS application user interface such that retrieval of a member's documents (when a member's record is open on the screen) may be initiated with a single operation, such as clicking on an Imaging Folder link.			
720	Imaging	Image retrieval integration with the PAS query capability such that the output of a query can be used to retrieve images.			
721	Imaging	Ability to perform index validation through an automatic look-up in the PAS database during the index process within the imaging solution.			
722	Imaging	Ability to assist the indexer when the only data available from an imaged document may not uniquely determine the member to whom the document belongs. Assistance to include but not be limited to popping up a list of all members with the indicated last name and allowing the indexer to select one by DOB, by address, Member ID or by SSN.			
723	Imaging	Ability to ensure real-time data synchronization (of indexing data) between the PAS database and the imaging solution.			
724	Imaging	Ability to integrate the imaging system with the electronic workflow system such that the release of an image (or batch of images) to the image archive initiates the appropriate workflow process(es) for each of the documents in the batch.			
725	Imaging	Ability to scan documents in duplex mode and use thresh holding to determine automatically whether the back side of a document is to be retained or discarded.			
726	Imaging	Ability to do full-text indexing of documents to support later retrieval via full text searches.			
727	Imaging	Ability to support classes of documents beyond those used just in the retirement system.			
728	Imaging	Ability to provide user administration capabilities to include but not be limited to adding users and setting user access rights with a Microsoft Windows-based User Interface.			
729	Imaging	Ability to temporarily assign one or more documents in the member archive to one or more "Case" folders or "virtual paper clips" in order to assist in subsequent retrievals.			
730	Imaging	Ability to apply user security to "case" folders and "virtual paper clips"			
731	Imaging	Ability to import and index imaged documents generated outside the PAS or imaging system.			
732	Imaging	Ability to automatically and/or manually redact specific portions of retrieved correspondence and forms when sending copies of that material to other recipients.			
733	Imaging	Ability to record receipt of documents when they are received, scanned and indexed.			
734	Imaging	Ability to support Virtual ReScan software or similar software and/or firmware that will automatically correct and enhance image quality.			
735	Imaging	Ability to change index attributes for an entire set of documents.			
736	Imaging	Ability to apply security to the input, editing and deletion of annotations with an appropriate audit trail.			
737	Imaging	Ability to track all access within the image archive and to generate reports of that access.			
738	Imaging	Ability to provide calendar widgets in inputting dates.			
739	Imaging	Ability to limit and/or restrict use of special characters in the image indexes.			
740	Insurance	Ability to generate insurance discrepancy report			
741	Insurance	Ability to determine if the retiree's monthly annuity has sufficient funds to cover the monthly insurance premium and generate receivables for those retirees who do not have sufficient funds			
742	Insurance	Ability to provide a detailed accounting of all insurance based transactions, i.e., payroll, refunds, etc. for any specified time frame that is searchable and sortable			
743	Insurance	Ability to view insurance detail and summary reports generated from payroll			
744	Insurance	Ability to import health deduction files from various employers and update system monthly whether loaded by CCCERA or directly by employers via a Web Portal			
745	Insurance	Ability to manually add health deduction information for long-term care, employer groups, credit unions deductions, etc.			
746	Interest Processing	Ability to configure interest calculation using different parameters as well as (though not concurrently) calculate interest using CCCERA's current interest calculation parameters/routine/formula			
747	Interest Processing	Ability to vary the interest rate as determined by the actuary and as stored in PAS configuration files.			
748	Interest Processing	Ability to calculate and post interest for an individual, a select group, or all eligible members based on member status and plan.			
749	Interest Processing	Ability to notify CCCERA staff when processing termination refunds, benefit setups, active deaths during certain dates of potential residual interest after the interest posting.			
750	Interest Processing	Ability to run the interest calculation process as a test (e.g. without committing to member account) and produce edit reports for CCCERA Member Services to review, reconcile, and approve.			
751	Interest Processing	Ability to re-execute the interest posting process for those members that missed the interest posting period.			
752	Interest Processing	Ability to restrict calculating interest for certain members based on account status relative to the interest posting cutoff date.			
753	Interest Processing	Ability to display the interest rate used and the effective date per entry for which interest was calculated.			
754	Interest Processing	Ability when performing member account clean-up / adjustments to backout and recalculate interest accordingly.			
755	Interfaces and Integration	Ability to import tables returned by the actuary containing updated factors and rates.			
756	Interfaces and Integration	Ability to export data to various 3rd party vendors for investigation / matches (i.e., death match, address validation, LifeStatus360, etc.)			
757	Interfaces and Integration	Ability to integrate calendar events generated out of PAS with Microsoft Office.			
758	Interfaces and Integration	Ability to run (or create) an actuarial extract file and benefit statement file.			
759	Knowledge Management	Ability to update to the Knowledge Management Repository to include but not be limited to frequently asked questions, standard problems and responses, and other ad hoc information.			
760	Knowledge Management	Ability to provide an on-line Knowledge Management Repository of information supported by an integrated search engine that is capable of returning possible matches to key words and other searches including but not limited to Problem Incident Report (PIR) numbers, data base names and field names.			

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761	Knowledge Management	Ability to load and maintain a Help File and Glossary of terminology, as part of the Knowledge Management System used by CCCERA staff.			
762	Knowledge Management	Ability to provide the number of transactions approved, disapproved, in process for the month, year to date, compared to last year – by transaction type, member status, and totals.			
763	Knowledge Management	Ability to provide an on-line Knowledge Management Repository where at least the following are loaded, maintained and retrievable by full text search (i.e., State statutes and regulations; Federal law and regulations; Case law; CCCERA administrative rules; CCCERA Member or Employer Handbooks; CCCERA policies and procedures; CCCERA Office related notices; Historical calculation spreadsheets and methods of their use; Policies and procedures of specific employers; All appropriate contracts (union, etc.); Existing manuals; Various forms and instructions; Banking regulations; IRS regulations).			
764	Knowledge Management	Ability to provide in an on-line Knowledge Management Repository a context sensitive help capability.			
765	Knowledge Management	Ability to provide authorized users with the ability to update the Knowledge Management Repository.			
766	Knowledge Management	Ability to capture hits against specific items in the Knowledge Management repository in order to better understand their importance and possibly develop associated support material.			
767	Member Portal	Ability in Member Portal to calculate and/or estimate the effects of various federal and state withholding tax amounts.			
768	Member Portal	Ability, in Member Portal, to prevent an active member from updating their address or name (though allowing a deferred and retired member to do so) as these should be updated with the employer and through the transmittal process - with the ability to turn on and off per CCCERA policy.			
769	Member Portal	Ability to provide an online Web utility for CCCERA retired-members to update/maintain their federal and state withholding tax amount.			
770	Member Portal	Ability to generate a correspondence to the employer and/or member (e.g. email, employer portal notification) to setup a deduction to resolve contribution receivable for a member due to an age and/or tier adjust.			
771	Member Portal	Ability to produce a correspondence to the employer and/or member (e.g. potentially through employer portal, member portal or direct correspondence) indicating what new rate/tier should be used based on a revised membership date due to establishment of reciprocity.			
772	Member Portal	Ability to provide access to users with different statuses (e.g. a user who is an active member, a user who is a payee, a user who is retired, or a user who is a combination of one or more of these).			
773	Member Portal	Ability to systematically support user who have forgotten their password, their login ID or both with guidance for regaining access without CCCERA human intervention.			
774	Member Portal	Ability to extend the period for which a person has access to his / her account regardless of pay status (e.g. members with a terminated status can still have their account remain open so they could still obtain a copy of their 1099-R in January of the following year).			
775	Member Portal	Ability for user to create a user account without CCCERA intervention.			
776	Member Portal	Ability to support access to forms and (customized or generic) publications.			
777	Member Portal	Ability to support access and use through mobile devices.			
778	Member Portal	Ability to support the upload of member-scanned documents in PDF (or other) format through member or employer self-service.			
779	Member Portal	Ability to track the number of "hits" on a pages and other web-accessible material			
780	Member Portal	Ability to report on the number of active portal users and which tasks they are completing.			
781	Member Portal	The ability to report on the average time it takes for a member to complete specific tasks within the portal			
782	Member Portal	Ability to produce management reports providing metrics for established accounts, logins for a specific period, lock outs of existing account with ability to apply date range, individual user filter and ability to aggregate (collapse) results.			
783	Member Portal	Ability to display and review summary information for a member's account.			
784	Member Portal	Ability to generate a member statement online for a specific "as of" date.			
785	Member Portal	Ability to retrieve and display historical payment information (e.g. check or EFT stubs) with year-to-date information for that tax year displayed as well.			
786	Member Portal	Ability to add time stamps to messages submitted via Web Member Portal (e.g. Submitted April 15, 2019 at 5:10pm PST).			
787	Member Portal	Ability to send messages via the web interface including but not limited to reminders of various upcoming activities, a need for the member to respond or make a choice of something, and other such communication.			
788	Member Portal	Ability to provide members with a search capability that seeks information within Member Portal.			
789	Member Portal	Ability to manage uploaded documents in the same way (indexing, workflow routing) that a faxed or mailed and scanned document is processed.			
790	Member Portal	Ability to calculate a benefit estimate using data drawn from the system database as well as data provided by the member to project service and earnings.			
791	Member Portal	Ability to modify contact information (e.g. telephone number, email address, etc.) constraining it to confirmation through previously recorded information (e.g. emailing change to prior email).			
792	Member Portal	Ability to enter or modify direct deposit information to replace check distributions.			
793	Member Portal	Ability to submit a request for information from within the member's account (e.g. "Please send me a signed copy of your Retirement Option Election")			
794	Member Portal	Ability to support ADA compliance, permitting user override of CCCERA's brand-specified colors, font sizes, etc., on an individual member portal.			
795	Member Portal	Ability to calculate a purchase of service cost/contract within Member Portal.			
796	Member Portal	Ability to enforce field validations to ensure that all information entered within a page is valid and acceptable before it is submitted and accepted through the portal.			
797	Member Portal	Ability, with Member Portal, for member to calculate a comparison of the member's future retirement benefit with and without an eligible service credit purchase.			
798	Member Portal	Ability to generate a benefit estimate through web member services or a member self-service website.			
799	Member Portal	Ability for any and all portal functionality to be "turned on" and "turned off" per CCCERA policy			
800	Member Portal	Ability to interface Web Portal functionality with "Live Chat" capability to provide members / retirees with CCCERA assistance.			
801	Member Portal	Ability to interface Web Portal with LexisNexis, etc. for identification verification for web portal self-registration, etc.			

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802	Member Portal	Ability to generate a system alert if a Web Portal transaction is being executed more frequently than expected.			
803	Member/Employer Education	Ability to create intuitive, personalized and customized information prior to and/or as a result of any face-to-face or telephone member encounter.			
804	Member/Employer Education	Ability to design information and/or educational material specifically for use on the web portal.			
805	Member/Employer Education	Ability to intuitively push information and educational material to member portal, possibly triggered by pre-defined milestones, current events, or special opportunities.			
806	Member/Employer Education	Ability to produce generic documentation of plan and/or benefit information to reduce or eliminate the need for an inventory of pre-printed booklets and brochures.			
807	Member/Employer Education	Ability to capture into the member archive any content that is sent to the member.			
808	Member/Employer Education	Ability to maintain a version history of all standardized content pertaining to agency provided retirement benefits.			
809	Member/Employer Education	Ability to capture information from one-on-one counseling sessions to include but not be limited to questions asked, answers provided, information entered, forms and/or correspondence generated.			
810	Member/Employer Education	Ability to generate a counseling schedule to include but not be limited to assigning people to the counseling sessions, employer seminars and/or meetings.			
811	Member/Employer Education	Ability to generate a listing of counseling appointments based on various parameters to include but not be limited to by day, week, month and/or by an individual counselor or all counselors.			
812	Member/Employer Education	Ability to automatically generate an "Appointment Reminder" correspondence informing the member about an upcoming counseling session, seminar, pre-retirement workshop, etc.			
813	Member/Employer Education	Ability to determine whether a member has attended one of several education seminar types within the time period based on CCCERA defined parameters.			
814	Member/Employer Education	Ability to summarize and categorize survey results from paper forms and electronic surveys.			
815	Member/Employer Education	Ability to capture and subsequently use survey information to produce and deliver appropriately customized education information and/or material.			
816	Member/Employer Education	Ability to capture need for training through analysis of calls to Call Center and/or Help Desk and subsequently generate appropriate training topic list.			
817	Member/Employer Education	Ability to interface and/or extract relevant County HR training program information / data about seminars related to CCCERA business into the new PAS.			
818	Member/Employer Education	Ability to evaluate member history and demographic information to control, limit and/or encourage their attendance at specific educational events.			
819	Member/Employer Education	Ability to access key member demographics and calculated values, such as Date of Birth and Years of Service, to determine eligibility for and applicability of pre-retirement counseling sessions.			
820	Member/Employer Education	Ability to create a new seminar by copying information from an existing seminar.			
821	Member/Employer Education	Ability to designate a specific plan group (General, Safety) and tier to CCCERA's existing plans which include both a plan group and tier in the plan name. This will allow CCCERA to select plan group and/or tier in certain processes (seminar attendance rules) rather than having to select each individual plan.			
822	Member/Employer Education	Ability to integrate scheduling, resources and email communication with Outlook relative to calendar, personnel, meeting rooms and availability of all.			
823	Member/Employer Education	Ability to record notes relative to counseling sessions, whether held in person or over the phone, and associate/connect the notes with a member.			
824	Member/Employer Education	Ability to assign people to the counseling sessions and seminars.			
825	Member/Employer Education	Ability to generate member management reports showing demographics of members who have attended different types of seminars.			
826	Member/Employer Education	Ability to push life-event, seasonal and occupation-related educational material to members (via correspondence, postcard, e-mail, etc.) based on system created trigger lists defined by CCCERA.			
827	Member/Employer Education	Ability to print registration lists for check-in at seminars.			
828	Member/Employer Education	Ability to track and report members due benefit estimates as a result of enrolling in a retirement seminar and automatically generate the appropriate benefit estimates for each scheduled seminar.			
829	Member/Employer Education	Ability to provide reminders to assigned team member of appointments for processing.			
830	Member/Employer Education	Ability to manage on-line enrollment from a wait list once the initial allotment of seats is full.			
831	Member/Employer Education	Ability for an CCCERA operator to register a member for the seminar either in advance or on day of arrival.			
832	Member/Employer Education	Ability for the member to designate which email address is to be used for correspondence, communication, etc.			
833	Member/Employer Education	Ability, for any upcoming event, to provide event specific information including links to maps, reference material on website, etc.			
834	Member/Pensioner Maintenance	Ability to capture customer-submitted address changes through the Web site; for members and pensioners such changes will be placed in a suspense file and workflow will direct the approval of each change to a CCCERA employee before the change is posted to the system.			

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835	Member/Pensioner Maintenance	Ability to generate and display a member's employment history information on a single report to include but not be limited to salary, contributions, service, payroll period, employer, system and group.			
836	Member/Pensioner Maintenance	Ability to determine whether changed information was verified, especially for those cases where this information is changed back and forth multiple times, including supporting documentation.			
837	Member/Pensioner Maintenance	Ability to review and verify membership of a former member in the CCCERA system when a request is received from another retirement system.			
838	Member/Pensioner Maintenance	Ability to initiate a workflow and or notification to the imaging system when two accounts are merged or when an account is split.			
839	Member/Pensioner Maintenance	Ability to systematically audit certain changes, as determined by CCCERA, to a member record prior to applying a change.			
840	Member/Pensioner Maintenance	Ability to allow a member to change only the data fields approved by CCCERA using a Web utility.			
841	Member/Pensioner Maintenance	Ability to capture and maintain marital status information to include but not be limited to single, married, divorced and widowed.			
842	Member/Pensioner Maintenance	Ability to capture comments and/or attach notes to a member's account.			
843	Member/Pensioner Maintenance	Ability to link information so that users can view all the benefits an individual is receiving.			
844	Member/Pensioner Maintenance	Ability to access member accounts with a single entry screen.			
845	Member/Pensioner Maintenance	Ability to automatically notify member by correspondence (i.e. postcard) at career and/or retirement milestones to include but not be limited to disability, vesting, normal retirement, death in service and attaining age 72.			
846	Member/Pensioner Maintenance	Ability to automatically transfer all account information from the wrong Social Security number to the corrected Social Security number and automatically send a correspondence to the member and employer(s).			
847	Member/Pensioner Maintenance	Ability to determine if the requested change requires legal documentation and, if so, automatically send correspondence requesting the appropriate documentation.			
848	Member/Pensioner Maintenance	Ability to display the member account in both a summary and detailed view.			
849	Member/Pensioner Maintenance	Ability to identify vesting eligibility based on member's termination date, service and age and to automatically generate correspondence including the vested status by system and plan.			
850	Member/Pensioner Maintenance	Ability to maintain a history of positions held by a member and/or employee.			
851	Member/Pensioner Maintenance	Ability to view and/or download contributions, service credits, salary and/or earnings totals by user defined time periods			
852	Member/Pensioner Maintenance	Ability to retain a history of all changes to member data.			
853	Member/Pensioner Maintenance	Ability to reverse member account transactions.			
854	Member/Pensioner Maintenance	Ability to stop adding interest to a member's account once the member has retired, refunded or died.			
855	Member/Pensioner Maintenance	Ability to capture a Membership Statement distribution indicator so that a member can instruct CCCERA as to how the statement should be delivered (examples including but not limited to mail, e-mail, DO NOT DELIVER, Etc.).			
856	Member/Pensioner Maintenance	Ability to automatically notify members of earliest retirement dates.			
857	Member/Pensioner Maintenance	Ability to identify and automatically notify members required to take mandatory distribution.			
858	Member/Pensioner Maintenance	Ability to automatically calculate, credit and display year to date interest on member account balances.			
859	Member/Pensioner Maintenance	Ability to configure the system to use USPS address standardization and verification, effectively changing an address entered to a standardized address, and prompting the user to confirm the change.			
860	Member/Pensioner Maintenance	Ability to control addresses submitted through the employer reporting process from overwriting existing addresses without review for members not in active status and generate a warning during the transmittal trial run process.			
861	Member/Pensioner Maintenance	Ability to edit the address type drop list, through administrator configurations or maintenance, to eliminate unused address types (options) or address types with no related address record or potentially add new address types.			
862	Member/Pensioner Maintenance	Ability to reverse a member's transactions made within a plan, (e.g. as might arise from a PEPRA change), recalculate the same or corresponding transactions in another plan, and create transactions to affect the change for a range of dates or selected transactions. As part of the process, set the new plan code for the resulting transactions.			
863	Member/Pensioner Maintenance	Ability to track and maintain "active death election" indicator and options for active members with the ability to generate correspondence / follow-up if active member does not respond.			
864	Member/Pensioner Maintenance	Ability to track the expiration date of the "Release of Information" form and the person(s) authorized to receive information.			
865	Payroll	Ability to continue to pay a beneficiary of an alternate payee			
866	Payroll	Ability to calculate the Social Security offset at age 62.			
867	Payroll	Ability to make partial lumpsum payment and recalculate the purchase contract.			
868	Payroll	Ability to make various member adjustments moving contributions from pre-tax to post-tax and vice-versa.			
869	Payroll & Other Payments	Ability to automatically produce a Monthly Payroll Summary Report for reconciling a given month's benefit payroll to that of the preceding month (by reflecting the net effect of all new benefits, benefit adjustments, benefit reinstatements, and benefit deletion transactions that were posted during the payroll period against the prior period payroll)			

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870	Payroll & Other Payments	The Monthly Payroll Summary Report should also indicate the expected number of payments to be produced including the number produced in the previous pay period, plus number of new retirements, plus number of reinstated retirees, minus number of retirees suspended / terminated.			
871	Payroll & Other Payments	Ability to produce (and save indefinitely) an accurate payment register file, identified as a 'trial' or 'final' run, such that all amounts and check numbers can be reconciled with the actual checks produced.			
872	Payroll & Other Payments	Ability to capture check / payment statuses, including cancellation status at the check level, the account level and the payee level.			
873	Payroll & Other Payments	Ability to capture information from checks that were returned to CCCERA but not deposited and initiate workflow process for investigation and corrective action.			
874	Payroll & Other Payments	Ability to capture explanation from member relating to outstanding check that has not been cashed.			
875	Payroll & Other Payments	Ability to automatically generate correspondence to the member explaining that they have received xx-consecutive payments that have not been cashed or that a check is outstanding for more than xx-days.			
876	Payroll & Other Payments	Ability to generate correspondence notifying retiree of a reissued payment and reason for reissue.			
877	Payroll & Other Payments	Ability to match stop payment requests to payments made that have not yet cleared.			
878	Payroll & Other Payments	Ability to process a response from the member relating to uncashed check and trigger workflow for CCCERA user to re-issue a new check.			
879	Payroll & Other Payments	Ability to report the following types of check payment types including but not limited to original, replacement, re-issue and re-sent.			
880	Payroll & Other Payments	Ability to track income verifications, i.e., member / company / agency requesting income verification, including date received and date information was returned for both active and retired members.			
881	Payroll & Other Payments	Ability to produce various reconciliation reports used to reconcile benefit increases, escalations, etc., and ensure that the overall pension payroll is balanced before any disbursements are issued.			
882	Payroll & Other Payments	Ability to support a reconciliation process for all payroll transactions.			
883	Payroll & Other Payments	Ability to automatically generate correspondence notifying member of adjustment to monthly check or when there is a change in the benefit or deduction amount.			
884	Payroll & Other Payments	Ability to generate an additional information correspondence to the member, beneficiary, survivor retiree or financial institution.			
886	Payroll & Other Payments	Ability to generate New Retirees Detail Report.			
886	Payroll & Other Payments	Ability to generate Pension Register Report listing all existing retirees, newly added retirees and exclude those that were removed / terminated that period.			
887	Payroll & Other Payments	Ability to generate Pension Exception Report			
888	Payroll & Other Payments	Ability to generate various correspondence for name, address, W4P, and direct deposit changes.			
889	Payroll & Other Payments	Ability to produce a standard benefit increase correspondence to all recipients, accommodating both automated or ad hoc generated correspondence			
890	Payroll & Other Payments	Ability for user to maintain the benefit increase percentage at the fund / tier level.			
891	Payroll & Other Payments	Ability to accommodate QDRO payments (fixed amount or fixed percentage of benefit) and related COLA processing.			
892	Payroll & Other Payments	Ability to accommodate the addition of one-time special benefit increases / decreases that the CCCERA Board may choose to award.			
893	Payroll & Other Payments	Ability to automatically determine, process and pay retroactive benefit increases, if applicable.			
894	Payroll & Other Payments	Ability to automatically redistribute pension amounts to beneficiaries upon qualifying event, e.g., remaining dependent children when one of the dependent children reaches age 18.			
895	Payroll & Other Payments	Ability to automatically terminate benefits to beneficiaries upon a qualifying event, e.g., to a dependent child upon his / her reaching age 18.			
896	Payroll & Other Payments	Ability to calculate retroactive payments to a member who has been suspended from payroll for a period of time.			
897	Payroll & Other Payments	Ability to determine eligible retirees for existing and future benefit increases.			
898	Payroll & Other Payments	Ability to display all detailed benefit payment information (current/historical) for each electronic transfer/direct deposit or "paper" check initiated (e.g., check number, payment type, gross payment amount, net payment amount, deduction amounts, check address used).			
899	Payroll & Other Payments	Ability to maintain more than one benefit account for a payee, (e.g., retiree, beneficiary).			
900	Payroll & Other Payments	Ability to perform manual benefit increase calculations for cases where there are exceptions that could not be updated by the system.			
901	Payroll & Other Payments	Ability to perform payroll "trial run" to validate payroll data prior to execution.			
902	Payroll & Other Payments	Ability to provide an online Web utility for CCCERA members (retirees) to update/maintain their federal and state withholding tax amount, multiple check addresses, and other pertinent information.			

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903	Payroll & Other Payments	Ability to retain history of check addresses, the member's address, and their survivor's addresses, with effective dates 'attached' to all historical addresses.			
904	Payroll & Other Payments	Ability to store reasons for not receiving a specific COLA (per account).			
905	Payroll & Other Payments	Ability to track receipt of notification of death of retiree / survivor or notification of retiree divorce.			
906	Payroll & Other Payments	Ability to adjust distribution to mandated payee(s) when pension is adjusted or because of subsequent court action and to recover overpayments or make retroactive distributions.			
907	Payroll & Other Payments	Ability to automatically terminate benefits to beneficiaries upon expiration of the guarantee period.			
908	Payroll & Other Payments	Ability to suspend disability benefit payments due to non-receipt by the due date of any required documentation, including but not limited to annual earnings statement, medical recertification, disability reevaluation form or student certification.			
909	Payroll & Other Payments	Ability to display the net impact of adjustments made and to display them prior to payroll posting.			
910	Payroll & Other Payments	Ability to capture changes in individual account numbers and bank routing numbers for direct deposit of retiree payments.			
911	Payroll & Other Payments	Ability to capture disbursement status for cleared, outstanding, Stale Dated, void, repayment, or out-of-date.			
912	Payroll & Other Payments	Ability to capture and maintain separate disbursement addresses for refunds, death benefits and annuity payments.			
913	Payroll & Other Payments	Ability to capture and update key financial rollover institution information.			
914	Payroll & Other Payments	Ability to produce an ACH file compatible with that required by current bank/advice printer.			
915	Payroll & Other Payments	Ability to produce both an ACH file and a check file for vendor payments.			
916	Payroll & Other Payments	Ability to process the pension payroll by employer or the entire population			
917	Payroll & Other Payments	Ability to reverse a pension payroll			
918	Payroll & Other Payments	Ability to determine whether a COLA applies to an alternate payee account			
919	Portal Management	Ability to allow customers to customize their own portal interface to include the ability to request and receive intuitive, personalized and customized information of interest to them. Information could include materials from an inventory of multi-media presentations, tailored presentations, generic information, etc.			
920	Portal Management	Ability to provide an interactive, real-time member statement on the portal supporting drill-down capability to expand general information into detailed.			
921	Portal Management	Ability for the member to personalize the member portal interface for capabilities to include but not be limited to the areas they most frequently "visit" show at the top and the color scheme can be chosen by the member.			
922	Portal Management	Ability to assess all two-way portal activity, to include but not be limited to pages most visited, requests most frequently made and forms most frequently used.			
923	Portal Management	Ability to easily link via the portal to any relevant section of interest on CCCERA's web site.			
924	Portal Management	Ability to perform usability testing (and gathering analytics relating to such) on the portal interface			
925	Portal Management	Ability to support ADA compliance, permitting user override of CCCERA brand-specified colors, font sizes, etc., on an individual customer portal.			
926	Portal Management	Ability to support one-click access to forms and (customized or generic) publications.			
927	Portal Management	Ability to support step-by-step and/or context-sensitive, video and audio help in filling out electronic forms and requests			
928	Portal Management	Ability to access portal via mobile devices			
929	Portal Management	Ability to ensure that electronic- and corresponding paper-based forms follow the same design and development steps so that the approved end result of the design process will be forms that are very similar (if not exactly the same) in layout and exactly the same in terms of data collected.			
930	Portal Management	Ability to ensure that any electronic form completed on the web can be immediately printed by the user or submitted and later recalled for viewing or printing from the archive and when printed or viewed looks substantially like the paper version of the same form (including details such as the form number)			
931	Portal Management	Ability to perform appropriate edit checks on all data entered via the web to ensure validity prior to acceptance by the system.			
932	Portal Management	Ability to interactively provide the status of any open request the member or employer has made of CCCERA.			
933	Portal Management	Ability to support applications on mobile devices (to include but not be limited to iPod/iPad, Android, and Windows Mobile) for common applications such as appointment scheduling and general information look-up.			
934	Portal Management	Ability to send messages via the web interface including but not limited to reminders of various upcoming activities, a need for the member to respond or make a choice of something, and other such communication.			
935	Portal Management	Ability within the member and employer portals for the web user to report usability issues and other problems with the web interface and to make suggestions for improvements			
936	Portal Management	Ability to support the upload of customer-scanned documents in PDF (or other) format through member or employer self-service.			
937	Portal Management	Ability to support use of "electronic signatures" for all electronic transactions			
938	Portal Management	Ability to permit non-IT staff to update screens and/or messages			
939	Portal Management	Ability to provide customers with a search capability that seeks information within the portal, the CCCERA web-site, the knowledge archive, other public retirement-related sites, etc.			

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940	Portal Management	Ability to provide customers with the ability to print to a PDF file so they can save an electronic version of the data they submit via the portal			
941	Portal Management	Ability to present electronic information in a way that optimizes view ability and available screen dimensions, e.g., one vs. multiple columns			
942	Portal Management	Ability to push email or SMS alerts to customers when new messages are posted to their portal – if turned on by the customer			
943	Portal Management	Ability for CCCERA Web (not IT) staff to customize any portion of the portal screen through integration of widgets, links, etc.			
944	Portal Management	The ability to survey portal users (and groups of portal users with similar characteristics) on their satisfaction with the portal, including the ability to calculate and report on responses, and compare results between discrete survey periods.			
945	Portal Management	The ability to report on the number of active portal users and which tasks they are completing.			
946	Portal Management	Ability to support user feedback for reporting of anything "wrong" with the portal or web site with a behind-the-scenes provision to route that feedback to the appropriate CCCERA staff person or role			
947	Portal Management	Ability for the member or employer to see only one instance of any particular reminder or select a check box to see the reminder every time they interact with the system.			
948	Portal Management	Ability when a form is forwarded to an edit/validate step that the valid fields remain filled and do not require re-entry.			
949	Power of Attorney	Ability to display Guardianship information as part of the member data.			
950	Power of Attorney	Ability to capture a Power of Attorney and whether Dual or General and "activate" the Power of Attorney based on a specific process / situation			
951	Power of Attorney	Ability to document the activities to which the Authorized Agent is limited according to each individual member for which they are acting.			
952	Power of Attorney	Ability to manage security in situations where multiple members of an agency are acting on behalf of multiple CCCERA members.			
953	Power of Attorney	Ability to record POA received date, effective date, termination date, designation status, durable POA, springing POA and triggers, and other POA characteristics including what authorities and privileges the agent has under the specific member POA designation.			
954	Power of Attorney	Ability to record under what conditions the POA terminates.			
955	Power of Attorney	Ability to record within PAS what POA powers persist or arise after the member's death.			
956	Power of Attorney	Ability to clearly indicate on the member record, as displayed when a member record is retrieved, that an active representative exists for the member.			
957	Power of Attorney	Ability to display the status of any POA designation in process or in effect for a member on a screen readily accessible by personnel or an authorized user to respond to questions on member's account.			
958	Power of Attorney	Ability to change the power of attorney, guardian or trustee status from "approved" to "revoked" or "expired" when the specified duration has been exhausted (the expiration date has been reached).			
959	Power of Attorney	Ability to view current and historic power of attorney information.			
960	Purchase of Service	Ability to post purchased service credit to member's account based on the CCCERA purchase of service process.			
961	Purchase of Service	Ability to create an un-remitted contribution report so that CCCERA knows what money is still owed on all outstanding service purchases.			
962	Purchase of Service	Ability to capture each service purchase payment including but not limited to tax status, transaction date, effective date, and amount of payment.			
963	Purchase of Service	Ability to post each service purchase payment, whether from a member, employer or institution, to the correct service purchase contract and scheduled payment.			
964	Purchase of Service	Ability to capture from the member a request for purchase of service information via a purchase of service application form and/or letter.			
965	Purchase of Service	Ability to capture a request for purchase of service estimate or update to a previous estimate from the member or CCCERA staff through a Web utility.			
966	Purchase of Service	Ability to track and report the number of Service Credit Purchase Agreements to include but not be limited to requested, processed and paid for in a lump-sum payment or payment scheduled (completed or in process).			
967	Purchase of Service	Ability to automatically generate correspondence requesting additional information relating to an incomplete purchase of service record and include the appropriate application highlighting the areas that need to be completed and/or corrected.			
968	Purchase of Service	Ability to automatically generate reimbursement (with correspondence of explanation) to the member, or financial institution for an overpaid, erroneous, or member-rescinded purchase of service agreement (with appropriate, automated tax handling).			
969	Purchase of Service	Ability to generate a denial correspondence if member is ineligible to purchase service credit.			
970	Purchase of Service	Ability to generate a Service Purchase Estimate (also called an Agreement, Cost Sheet, Invoice or Turn-around Document) that includes but is not limited to the member cost for the purchase, a selection of available payment plans, the amount of service credit to be purchased and retirement benefit estimates that compare the member benefits both with and without the completed purchase agreement			
971	Purchase of Service	Ability to generate a Service Purchase Agreement / Cost Sheet / Invoice for the employer, if applicable, which provides the employer's share of the cost of the member's purchase and the terms and conditions based on CCCERA defined parameters.			
972	Purchase of Service	Ability to generate an updated statement/invoice for the member or employer when an overdue payment arrives.			
973	Purchase of Service	Ability to automatically generate delinquency correspondence based on CCCERA defined parameters to the member when agreed upon payments are not made by the member.			
974	Purchase of Service	Ability to generate correspondence informing member of CCCERA's decision to cancel the purchase due to overdue payments to include but not be limited to reverse purchase of service credit transactions posted prior to cancellation and intent to return all payments made to date.			
975	Purchase of Service	Ability to generate correspondence to acknowledge completion of a purchase of service.			
976	Purchase of Service	Ability to produce correspondence to acknowledge receipt of each application.			
977	Purchase of Service	Ability to "pend" purchase of service payments until the purchase has been completed, then post the full amount of service credit purchased to the member's account (alternatively, permit posting of partial purchases), based on CCCERA decision.			
978	Purchase of Service	Ability to automatically accept incoming rollover payments from valid financial institutions and/or retirement plan toward a member's purchase of service receivable.			

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979	Purchase of Service	Ability to accommodate a member's election to cancel a purchase of service agreement			
980	Purchase of Service	Ability to accommodate multiple purchases of the same type			
981	Purchase of Service	Ability to allow a retiree to purchase additional service after the date of retirement based on CCCERA defined parameters.			
982	Purchase of Service	Ability to allow for various member payment methods to include but not be limited to a lump sum payment, rollover and payroll deductions.			
983	Purchase of Service	Ability to apply interest to an established Purchase Agreement, Cost Sheet and/or Invoice			
984	Purchase of Service	Ability to automatically recalculate an established Purchase Agreement, Cost Sheet and/or Invoice and generate an updated cost correspondence if there was an interruption in payments.			
985	Purchase of Service	Ability to apply the appropriate service credit amount to a member's account based on the purchase of service agreement and payments received, based on CCCERA defined parameters.			
986	Purchase of Service	Ability to automatically create, update, and maintain a history of each purchase of service receivable record to include but not be limited to amount of service, type of service, cost of service, payments received, "Investment in Contract" for a member purchase of service agreement.			
987	Purchase of Service	Ability to determine and calculate amount of service credit member is eligible to purchase for each type of service credit purchase.			
988	Purchase of Service	Ability to calculate a comparison of the member's future retirement benefit with and without an eligible service credit purchase.			
989	Purchase of Service	Ability to automatically detect overdue payments and/or interruption in payments.			
990	Purchase of Service	Ability to determine the cost and payment plan(s) for the various types of CCCERA service credit purchases to include but not be limited to Public Service, Redeposit, Time Prior to Membership (i.e., Pick-Up), Leave of Absence, Conversions, and Non-Service Related Contribution Adjustments.			
991	Purchase of Service	Ability to generate pre-filled purchase of service applications and track the distribution, turn-around and processing of each form.			
992	Purchase of Service	Ability to manage and handle "military leave" law			
993	Purchase of Service	Ability to maintain a history of individual purchase records for each purchase applied for at the level of detail desired by CCCERA.			
994	Purchase of Service	Ability to maintain a scheduled payroll deduction payment process as part of the employer's regular wage and contribution reporting schedule based on CCCERA defined parameters.			
995	Purchase of Service	Ability to maintain a table of purchase of service types including but not limited to an associated code, name and description.			
996	Purchase of Service	Ability to automatically determine all rates, factors, and tables associated with each type and period of service credit purchase to include but not be limited to member rate and interest rates.			
997	Purchase of Service	Ability to maintain in member account a detailed history of all refunds such that, when the member elects to purchase service corresponding with a historical refund, the cost of the purchase can be calculated automatically and, when payment is received, the account can be re-built automatically (to avoid users having to manually re-build the account).			
998	Purchase of Service	Ability to maintain the eligibility requirement rules and associated calculation for each type of service credit purchase.			
999	Purchase of Service	Ability to provide the member and/or CCCERA staff a calculator to provide a new or updated estimate of purchase of service costs through a Web utility.			
1000	Purchase of Service	Ability to route the account for audit and/or review prior to issuing a Service Purchase Agreement, Cost Sheet or Invoice.			
1001	Purchase of Service	Ability to support receipt of payment via employer payroll withholding.			
1002	Purchase of Service	Ability to track and maintain the tax status (i.e., before tax or after tax) of all service credit purchase payments			
1003	Purchase of Service	Ability to update member demographic information while processing a purchase of service application.			
1004	Purchase of Service	Ability to provide member with acknowledgement that an outside 3rd party has made a payment.			
1005	Purchase of Service	Ability to allow member to check outstanding payment balance via web portal.			
1006	Purchase of Service	Ability to maintain service purchase credit within the system and display both summary and detailed service credit by type			
1007	Purchase of Service	Ability to identify, generate and send projected stop notices for all service purchase types to insure that they are stopped in timely fashion, upon member authorization, thus avoiding additional, unnecessary deductions and subsequent refunds.			
1008	Purchase of Service	Ability to create a member contribution receivable for those situations where a member was not reported by the employer and the member was due that 1st month; and create a correspondence to the member, include amount owed on benefit statement, etc.			
1009	Purchase of Service	Ability for the system to calculate contributions owed including interest where the employer either over-reported or under-reported contributions for a single member, group of members or entire population			
1010	Purchase of Service	Ability to add service credit to a member's account without corresponding contributions and/or purchase due to situations like PETRA Compensation Limits			
1011	QDRO & Court Orders	Ability to alert the user when a court order is being processed for a member or mandated payee being accessed.			
1012	QDRO & Court Orders	Ability to cross-reference and navigate to multiple member' accounts associated with a court order to include but not be limited to member, ex-spouse, current spouse, retiree, and mandated payees.			
1013	QDRO & Court Orders	Ability to capture and maintain data related to one or more court orders.			
1014	QDRO & Court Orders	Ability to append additional data to an existing court order if modifications are received.			
1015	QDRO & Court Orders	Ability to initiate a new QDRO/DRO process, upon receipt of a court order for a member or retiree who has a completed court order,			
1016	QDRO & Court Orders	Ability to generate communications outlining the rights of individuals in regard to court orders.			
1017	QDRO & Court Orders	Ability to report, monitor and reconcile the division of benefit payments to one or more payees based on one or multiple court orders.			
1018	QDRO & Court Orders	Ability to generate responses to requests for information in regard to a court order.			
1019	QDRO & Court Orders	Ability to support benefit adjustments based on the rules associated with a finalized court order(s).			
1020	QDRO & Court Orders	Ability to automatically start and/or stop payments when the maximum amount has been paid or other conditions are met based on the court order defined parameters.			
1021	QDRO & Court Orders	Ability to capture and track the review of court orders by multiple parties to include in-house staff as well as third parties.			
1022	QDRO & Court Orders	Ability to input and maintain non-member payee demographic and monetary-related information, for alternate payees.			
1023	QDRO & Court Orders	Ability to generate an estimate of the amount of the member's benefit that will be affected by a court order.			
1024	QDRO & Court Orders	Ability to generate communications to affected parties regarding a new court order.			

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1025	QDRO & Court Orders	Ability to split and subsequently maintain accounts and/or benefits appropriately in the processing of an accepted QDRO, automatically creating additional accounts as necessary.			
1026	QDRO & Court Orders	Ability to recover any amounts overpaid to the member based on court order defined parameters.			
1027	QDRO & Court Orders	Ability to "undo" a split of accounts/benefits			
1028	QDRO & Court Orders	Ability to track spouse's age and the length of marriage for determining eligibility of continuance.			
1029	QDRO & Court Orders	Ability to flag an account when a safety non-member alternate payee attains age 50 and the member has retired			
1030	QDRO & Court Orders	Ability to split a benefit in the cases of a post-retirement divorce.			
1031	Reciprocity	Ability to initiate a reciprocity request, collect and record data			
1032	Reciprocity	Ability to indicate if service credit is audited or not and indicate components of FAS for reciprocal agency.			
1033	Reciprocity	Able to enter historical reciprocal information in system when multiple systems are linked with reciprocity; including dates, service credit and tier type.			
1034	Reciprocity	Ability to determine if a member has previously elected reciprocity.			
1035	Reciprocity	Ability to include potential eligibility of benefits based on reciprocity in any request for a benefit estimate.			
1036	Reciprocity	Ability to generate a Reciprocity Listing report			
1037	Reciprocity	Ability to calculate contribution adjustments based on reciprocity or if reciprocity agreement is broken			
1038	Reciprocity	Ability to automatically transfer contributions from one tier to another due to reciprocity establishment			
1039	Reciprocity	Ability to create a report / tracking log for pending reciprocity while CCCERA waits for advice notices from reciprocal agency.			
1040	Records Management	Ability to automatically alert an authorized user when the retention period for one or more documents has expired and the document is ready for destruction.			
1041	Records Management	Ability for an authorized user to order the automatic destruction of indicated electronic records, upon receipt of notification of retention period expiration.			
1042	Records Management	Ability for an authorized user to order the destruction of the indicated physical records, upon receipt of notification of retention period expiration.			
1043	Records Management	Ability to extend the retention period for a specific record or set of records based on an event that warrants such an extension.			
1044	Records Management	Ability to alert a governing authority if an attempt is made to destroy electronic records whose retention period has not yet expired.			
1045	Records Management	Ability to generate reports indicating all activity within the Records Management system to include but not be limited to records in, records extended and records destroyed.			
1046	Records Management	Ability to integrate Records Management system with scanning subsystem and to automatically assign the appropriate default retention period based on CCCERA defined parameters.			
1047	Records Management	Ability to generate reports and audit trail of all record destruction activities, identifying the following fields to include but not be limited to the class of record, the age of the record, and the staff member who performed the activity and/or provided the authorization.			
1048	Records Management	Ability to accommodate in the records management system multiple record types to include but not be limited to electronic documents in the imaging system, electronic reports captured in the electronic reports management system, emails, and physical documents such as paper.			
1049	Records Management	Ability to maintain the integrity of an electronic record to ensure that it is not altered nor deleted before its time.			
1050	Refund	Ability to notify staff when an ex-spouse takes a refund.			
1051	Refunds	Ability to automatically generate correspondence to a member who is requesting return of contributions.			
1052	Refunds	Ability to automatically accommodate retroactive interest posting for those cases in which a refund and/or withdrawal should not have been taken and is reversed.			
1053	Refunds	Ability to automatically suspend a refund from being processed if a new enrollment form is received for the member.			
1054	Refunds	Ability to capture direct rollover related information to include but not be limited to percentage or specific amount to be rolled, financial institution information, account number and plan types.			
1055	Refunds	Ability to capture refund related information from refund documents.			
1056	Refunds	Ability to provide statistical, managerial and demographic data for various reporting purposes, such as number of refunds generated in total, by tier, by job title and whether vested or not.			
1057	Refunds	Ability to automatically generate an additional information correspondence from an incomplete refund record and include the appropriate application highlighting the areas that need to be completed or corrected.			
1058	Refunds	Ability to create a system generated refund payment correspondence.			
1059	Refunds	Ability to generate all refund-related documents to include but not be limited to Refund Application, Rollover Form, Waiver of Retirement Benefit Form and General Refund Correspondence; tracking their distribution, turn-around, and processing.			
1060	Refunds	Ability to split the amount to be refunded between the member, financial institutions, and/or another third party in a single transaction.			
1061	Refunds	Ability to assign to a refund: cancellation status, status date, and reason as a reason code in the member's account.			
1062	Refunds	Ability to generate a report for members who are not vested and have been inactive for time period based on CCCERA defined parameters.			
1063	Refunds	Ability to automatically calculate and apply or back out interest.			
1064	Refunds	Ability to automatically calculate the amount to be refunded.			
1065	Refunds	Ability to automatically correct and/or reverse a refund transaction already posted against a member's account.			
1066	Refunds	Ability to determine retirement eligibility of member requesting a refund and automatically generate appropriate follow-up correspondence.			
1067	Refunds	Ability to identify and appropriately resolve a termination date discrepancy between the refund application and employer reporting.			
1068	Refunds	Ability to recalculate a refund based on receipt of additional information and re-verify payment options to include but not be limited to direct rollover versus direct payment.			
1069	Refunds	Ability to refund both regular contributions and purchase of service contributions, delete the service credit on the account and void any outstanding purchases of service.			

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1070	Refunds	Ability to route the account for audit and/or review prior to issuing refund check.			
1071	Refunds	Ability to automatically support Court Ordered processing where there are multiple payments to be issued.			
1072	Refunds	Ability to track termination date, last wage and contribution reporting date, refund request date, refund-processed date and check date.			
1073	Refunds	Ability to update member demographic information while processing a refund application or direct rollover form.			
1074	Refunds	Ability to track the distribution, turn-around and processing of multiple direct rollover forms; confirm the member has completed a Rollover Form for each financial institution.			
1075	Refunds	Ability to ensure that once a refund has been processed that the member's account is cleared, closed or zeroed-out			
1076	Report Management	Ability to capture and archive any of the print streams generated by the PAS application and make it immediately available; and ability to redact PII information.			
1077	Report Management	Ability to index captured print streams appropriately, including to a member record if appropriate.			
1078	Report Management	Ability to print archived output in the format in which print stream was captured so that printed copy looks just like the original.			
1079	Report Management	Ability to access any member-specific data to include but not be limited to archived images, emails, voice and report records with a single query from within the PAS application.			
1080	Report Management	Ability to add multiple text annotations to a page of an archived report.			
1081	Report Management	Ability to provide appropriately secured user access to archived reports from outside of the PAS application.			
1082	Report Management	Ability to retrieve member-specific documents, images or specific print records.			
1083	Report Management	Ability to search for and retrieve portions of archived reports based on CCCERA defined criteria.			
1084	Report Management	Ability to import to the print archive, documents generated outside of the normal workflow process.			
1085	Report Management	Ability to generate a complete set of directories for automatically indexing a specific computer output document through a database lookup scheme.			
1086	Report Management	Ability to generate a report of all the print streams that have been processed into the repository within a specific time period.			
1087	Report Management	Ability to generate an exception report when an automated print archive capture routine aborts for any reason, and fully recover.			
1088	Report Management	Ability to attach reports to work items in workflow.			
1089	Report Management	Ability to export data from the report archive into alternative formats to include but not be limited to Microsoft Excel and Adobe Acrobat.			
1090	Report Management	Ability to provide member-specific report archived records through the CCCERA web portal.			
1091	Reporting & Querying	Ability to extract accurate actuarial information			
1092	Reporting & Querying	Ability to provide performance reports for each functional area, showing in both tabular and chart form the following information (Current Month, Year to date, Last year-this month and Last year-year to date)			
1093	Reporting & Querying	Ability to produce a series of standard reports, on a periodic basis and/or on demand, all of which support "drilling down" to various levels of detail to include but not be limited to the following areas: Deaths - Number of deceased active and retiree / beneficiaries during the user selected reporting period Terminations - Number of members receiving refunds and forfeitures of refunded service during the user specified reporting period Employer Payroll - Total Payroll Amounts, categorized by job-classification, etc. during the user specified period Reconciliation of Demographics - Reconciliation of the current membership population by employer with the membership population from the prior period Retirements - The number of retirements by type, that occurred during the user selected reporting period Employees Eligible for Retirement - Number of active members who are eligible for retirement as of the report date Ages at Retirement - Distribution of retirees according to age classifications at retirement New Members - Number of new members added during the user selected reporting period Retirement Benefit Computations - Number of estimates and/or final computations performed during the user selected reporting period Disability Retirements - Number and type of disability retirements during the user selected reporting period Purchase of Service - Number of purchases and their costs by type during the user selected reporting period			
1094	Reporting & Querying	Ability to generate, at a minimum, 150 defined and to-be defined reports, 75 defined and to-be defined forms, and 200 defined and to-be defined correspondence (for purposes of calculation, one report, form, correspondence that can be used for various plans will be counted as one report, form, correspondence)			
1095	Reporting & Querying	Ability to run queries seeking various demographic "slices" of the CCCERA population, e.g., "All members within two years of possible retirement (including those who would meet that criteria should they purchase service to cover 'empty' years)," "All members who have become members within the past five years." etc., so they may be issued invitations to seminars			
1096	Reporting & Querying	Ability to track and report on staff performance (e.g., quantity and quality) individually and as a group on a daily, weekly, monthly and calendar year basis			
1097	Reporting & Querying	Ability to export report information to off-the-shelf spreadsheet programs (e.g., Excel) or in an ASCII or HTML format			
1098	Reporting & Querying	Ability to list, generate, track and report against various types of errors made by various entities that interact with CCCERA (employers, members, staff, etc.)			
1099	Reporting & Querying	Ability to provide a report of counts of active members, inactive members/vestees, and retirees (including survivors) for any given date			
1100	Reporting & Querying	Ability to send output from a report to: printer, file, screen, portal, and e-mail			
1101	Reporting & Querying	Ability for the reporting tool (if applicable) to support unlimited CCCERA user licensing			
1102	Reporting & Querying	Ability to access a user-friendly report writer for creating custom reports with graphics, headers, footers, totals, subtotals, sorting, and statistics			
1103	Reporting & Querying	Ability for any authorized user to add new reports to the report menu for easy access			
1104	Reporting & Querying	Ability to direct printing of reports/forms/correspondence to selected printers with an established default setting			
1105	Reporting & Querying	Ability to include on all reports watermarks and detailed heading information, including version/release number, the date of the last modification of the software that generates the report, the name of the program that generates the report, a unique name for the report, and the date of the running of the report			

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1106	Reporting & Querying	Ability to print the requesting user's user-id and the date/time of printing on all reports			
1107	Reporting & Querying	Ability to print and queue for printing to existing and future industry standard CCCERA printers			
1108	Reporting & Querying	Ability to provide a development or query "Library" outside of the normal line-of-business application where users can share queries, information, etc.			
1109	Reporting & Querying	Ability to provide a graphic, drag-and-drop report design environment			
1110	Reporting & Querying	Ability to provide a report generation strategy / tool capable of integrating additional data from any other accessible relational data sources into a single report			
1111	Reporting & Querying	Ability to provide various online support features ("wizard", help system, etc.) that will take a user step-by-step through a report "building" process			
1112	Reporting & Querying	Ability to query on all system data (business relevant, transaction history, log files, audit records, etc.) depending on security profiles			
1113	Reporting & Querying	Ability to queue reports for printing destination			
1114	Reporting & Querying	Ability to save for future use any valid query developed by any user			
1115	Reporting & Querying	Ability to select and block-out (redact) any portion of a record for display/printing and identify areas omitted from displayed/printed copy			
1116	Reporting & Querying	Ability to select and display/print specific records from a listing of records matching the search criteria			
1117	Reporting & Querying	Ability to support ad-hoc reporting, where custom reports can be created for single use or saved for continued use			
1118	Reporting & Querying	Ability to support dynamic content that incorporates drill-down, charts and graphs			
1119	Reporting & Querying	Ability to support industry standard multi-dimensional Online Analytical Processing (OLAP) data source extraction, transmission, formatting as it relates to reporting			
1120	Reporting & Querying	Ability to support viewing/printing by allowing the user to determine the length of the report prior to viewing/printing (e.g., number of pages)			
1121	Reporting & Querying	Ability to support report sorting, filtering, and summary report output and save format for future use			
1122	Reporting & Querying	Ability to support the creation of reports using relational criteria and logical operators (e.g., less than, greater than, equal to or less than, wild cards, Boolean operators, and combinations of each), including searches against message text and key indexed fields			
1123	Reporting & Querying	Ability to support the integration of reports with existing applications using industry accepted programming and scripting languages such as: JavaScript, VBScript, COM, XML			
1124	Reporting & Querying	Ability to support the viewing of reports that result in large volumes of data by: Providing a warning of the number of records found; Prompting the user to continue/refine/alter the query; Displaying a single page of data at a time Etc			
1125	Reporting & Querying	Ability to terminate a query or report while in process			
1126	Reporting & Querying	Ability to track accounts/folders returned from review due to error, inquiry, or need for additional information for staff performance			
1127	Reporting & Querying	Ability to view requested reports on the screen prior to printing report, i.e., print preview			
1128	Reporting & Querying	Ability to store the data to perform performance metric reporting (for appropriate periods of time, e.g., year to date, period to date, comparison to previous periods, comparison to previous year to date) and the ability for a user administrator to purge data (such as a query result, NOT PAS data) and the ability to restore such purged data			
1129	Reporting & Querying	Ability to present Performance Metric data in graphical form (showing trends) allowing management to see trends/issues and respond by taking proactive steps to manage agency workload			
1130	Reporting & Querying	Ability to store the data necessary for Performance Metrics in such a way that it can subsequently be manipulated and reported upon by a knowledgeable user using an ad hoc query or report generator.			
1131	Reporting & Querying	Ability to produce at least (but not limited to) the following Performance Metrics: Production metrics – backlog; Production trends – year to date, year to year; Efficiency metrics – work queues; Workflow metrics – actual cycle times vs. target cycle times; User metrics – actual cycle times vs. target cycle times; Accuracy Metrics – providing a comparison of the quantity of work done correctly the first time vs. that which has to be re-worked for			
1132	Reporting & Querying	Ability to enable the end-user to use data sets (flat files) as input for functions in the ad-hoc query tool including but not limited to match/merge, sorting and reporting, both on "foreign" data sets by themselves and in conjunction with data from the retirement database.			
1133	Reporting & Querying	Ability to build sort keys and specifying sort sequences on any data items or fields used for selection criteria in the ad hoc query tool.			
1134	Reporting & Querying	Ability to limit use of the ad hoc and standard query capability to authorized users			
1135	Reporting & Querying	Ability to limit query access to data to authorized users			
1136	Reporting & Querying	Ability to provide employers and other authorized third parties with the ability to query against all (and only) the data on their past and current employees that they have supplied			
1137	Reporting & Querying	Ability to schedule one or more reports to be run unattended			
1138	Reporting & Querying	Ability to query for contact information for various groups of members (based on one or more member characteristics) that can be exported for delivery to existing survey tools (i.e. Survey Monkey)			
1139	Reporting & Querying	Ability to appropriately scale output to standard paper sizes and layouts			
1140	Return to Work	Ability to apply system, plan and/or group specific standards and conditions in event of return to work.			
1141	Return to Work	Ability to automatically inform CCCERA staff when a retiree restarts wage and contribution reporting (returns to work) and provide retirement information based on CCCERA defined parameters to ensure that the member adheres to the "return to work" requirements.			

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1142	Return to Work	Ability to determine, for a member, if a prior retirement exists and what the status of that retirement is at the time of re-employment or return to work.			
1143	Return to Work	Ability to generate correspondence to retired member returning to work to request repayment of retirement benefits previously paid.			
1144	Return to Work	Ability to generate correspondence to member confirming return to work.			
1145	Return to Work	Ability to capture and manage the status and other information of the post-retirement employment.			
1146	Return to Work	Ability to automatically reinstate suspended benefits and withholding.			
1147	Return to Work	Ability to calculate a 2nd retirement option type for a retired member that returns to service and retires a 2nd time.			
1148	Return to Work	Ability to track hours worked for retired "return to work" temporary employees (i.e. 960-hour rule)			
1149	Statistical Reporting	Ability to use the appropriate user-friendly tools for executing ad hoc queries and reports against the production and development, test, training, and QA.			
1150	Statistical Reporting	Ability to compile and report by plan and sort and compile by calendar year: number of retirees, average benefit payment, average service credit at retirement, composition of service credit, final average salary at retirement and average age at retirement.			
1151	Statistical Reporting	Ability to compile by plan, to include but not be limited to the number of members actively contributing to the system, average service credit, average amount of service credit purchased by type and average age.			
1152	Statistical Reporting	Ability to maintain records of deceased active members and retirees/beneficiaries and produce such a report. This report must include the age at death, beneficiary information, date of death at a minimum.			
1153	Statistical Reporting	Ability to maintain records of members that receive refunds / rollovers of their contributions, the amount, as well as applicable dates, and produce such a report.			
1154	Statistical Reporting	Ability to calculate and report the average pay increase for members continuously employed. The report must be able to sort this information by employer and compare average pay increases against past years' increases.			
1155	Statistical Reporting	Ability to reconcile the current membership population by employer. The reconciliation must show which members terminated, retired, died, or became inactive, as well as new hires and transfers. This reconciliation must be detailed so a report can be produced and forwarded to employing units for verification.			
1156	Statistical Reporting	Ability to maintain records of the number of retirements, by type, that occur in a calendar year or ad hoc period by employer unit, including date the individual was added to retirement payroll and date of retirement. Also, the system must track when the benefit was finalized.			
1157	Statistical Reporting	Ability to record the age at which a member retires as well as the member's employer unit at the time of retirement and produce reports of this information.			
1158	Statistical Reporting	Ability to maintain and report the count of new members enrolled for any designated period by employer unit.			
1159	Statistical Reporting	Ability to report the number of estimates and benefit calculations which were completed for a user-specified period.			
1160	Statistical Reporting	Ability to report the count of applications filed for the various types of disability retirement and the period when the application was filed.			
1161	Statistical Reporting	Ability to compare counts of member and process centric data by transaction type across multiple time periods.			
1162	Statistical Reporting	Ability to distinguish in reporting among staff member, member and system-initiated changes to data.			
1163	Statistical Reporting	Ability to reconcile various aspects of the current member population at any point in time and over any period of time, as defined by actuarial reporting requirements.			
1164	Statistical Reporting	Ability to maintain and report workflow statistics for any business process; to include but not be limited to the number of processes performed, the amount of time elapsed in each step in the process, time spent waiting in a queue, time awaiting necessary member response based on CCCERA defined parameters.			
1165	Tax Reporting	Ability to ensure that, when entering benefit payment reversals, the reversal is entered correctly, fully, and accurately to eliminate the opportunity for erroneous or incorrect data being included in the 1099 run.			
1166	Tax Reporting	Ability to indicate, at the payee level, that federal withholding is either 945 reportable or 1042 reportable.			
1167	Tax Reporting	Ability to capture alternate address for mailing of Form 1099-R, without changing the recipient's permanent address.			
1168	Tax Reporting	Ability to capture, maintain, and apply federal and state tax table information with both retroactive and future effective dating; either to be loaded by CCCERA and/or the PAS Vendor.			
1169	Tax Reporting	Ability when printing actual 1099R forms to mask the member's Social Security Number.			
1170	Tax Reporting	Ability to have all issued 1099R forms stored on member account for easy access for staff and reprints			
1171	Tax Reporting	Ability to export the 1099R transmittal file to an external service in order to print the 1099s.			
1172	Tax Reporting	Ability to isolate from the 1099 run those members or payees who are nonresident aliens.			
1173	Tax Reporting	Ability to produce a report sufficient in detail to fully reconcile the 1099 run with the 1099 extract file.			
1174	Tax Reporting	Ability to produce reports for the IRS (annually) and CA EDD (quarterly) to facilitate Fiscal reconciling the reports.			
1175	Tax Reporting	Ability to produce compliant California EDD filings			
1176	Tax Reporting	Ability to produce the Form 945 and correctly segregate distributions to nonresident aliens (e.g. a check box for that payee indicating they receive a 1042).			
1177	Tax Reporting	Ability to process tax forms with domestic addresses separate from those with foreign addresses to accommodate additional required postage.			
1178	Tax Reporting	Ability to produce an appropriate 1099 for any disbursement that has an applicable tax consequence.			
1179	Tax Reporting	Ability to monitor the usage and/or depletion of a member's account balance both pre-tax and post-tax using an exclusion ratio based on the IRS simplified method.			
1180	Tax Reporting	Ability to accommodate the waiving of tax withholding.			
1181	Tax Reporting	Ability to assign distribution codes according to IRS regulations.			
1182	Tax Reporting	Ability to adjust the tax liability when an adjustment is made to a payee's benefit.			
1183	Tax Reporting	Ability to correctly calculate and accumulate all amounts that are required to be included on Form 1099-R.			
1184	Tax Reporting	Ability to display detailed payment and 1099-R history when a member questions the information; this breakdown shall be available to both CCCERA staff and to the member via the Web.			

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1185	Tax Reporting	Ability to generate, retain and export corrected Form 1099-Rs, reflecting changes made after the information has been sent to the IRS and state tax authority in accordance with IRS and state tax authority regulations.			
1186	Tax Reporting	Ability to generate, retain and export Form 1099-Rs to the IRS and State Tax Authority in accordance with IRS and state tax authority regulations.			
1187	Tax Reporting	Ability to generate, retain, and reprint the original Form 1099-Rs, via the web.			
1188	Tax Reporting	Ability to generate multiple Form 1099-Rs to a single payee (with multiple distribution codes).			
1189	Tax Reporting	Ability to implement a payee's tax withholding changes entered against a future date at the appropriate time.			
1190	Tax Reporting	Ability to maintain each member's pre-tax dollars, rolled-over funds and recovered contributions.			
1191	Tax Reporting	Ability to reconcile, by account and fund, the aggregate amount withheld from all benefit payments issued during a pay period against the amount calculated to be submitted to tax authorities.			
1192	Tax Reporting	Ability to verify federal and state taxability, reportability and withholding requirements of all retirement system distributions.			
1193	Tax Reporting	Ability to ensure negative amounts are not reported to taxing agencies.			
1194	Tax Reporting	Ability to automatically recalculate a corrected 1099-R when contributing data has been changed.			
1195	Tax Reporting	Ability to run 1099 production in test mode (i.e. run the process without impact to the member's account).			
1196	Tax Reporting	Ability to flag 1099Rs as Taxable Amount Not Determined based on a user entered flag for individual benefits.			
1197	Tax Reporting	Ability to ensure the system is in compliance with all historic and current tax forms, tax tables, rules, laws, etc.			
1198	Tax Reporting	Ability to make prior period adjustments (i.e., distribution codes) due to service-connected disability approval following service retirement and create prior year corrected 1099-Rs and related filings			
1199	Workflow	Ability to display the status of all workflow processes.			
1200	Workflow	Ability to initiate workflow processes both automatically or manually.			
1201	Workflow	Ability to track all member, employer, and third party related events as defined by CCCERA business areas.			
1202	Workflow	Ability to assign appropriate priority levels and/or dates for review of work and/or audit.			
1203	Workflow	Ability to track the receipt of triggering documents.			
1204	Workflow	Ability for supervisor to monitor staff's assigned work and progress.			
1205	Workflow	Ability to configure the audit and review step of various workflow business processes based on CCCERA defined parameters.			
1206	Workflow	Ability to prevent a work item from being removed from the workflow system without an entry being made in the workflow tracking log.			
1207	Workflow	Ability to query on work items that have been assigned by an individual.			
1208	Workflow	Ability to report and/or query on how much "lapsed time" a work item spent in each work step of a work process.			
1209	Workflow	Ability to report the status of all work-items through a simple query ordered by multiple criteria to include but not be limited to Member Name, Date-Initiated and Member ID.			
1210	Workflow	Ability to support measurement capabilities to include but not limited to average queue time, maximum queue time, minimum queue time, queue lengths, performance metrics and process bottleneck identification.			
1211	Workflow	Ability to automatically trigger various workflow processes based upon the initial value or a change in value of a field in the associated member account.			
1212	Workflow	Ability to automatically initiate and prioritize a work item based on business processing logic, such that the processing of that work item is performed prior to other work items within a work process.			
1213	Workflow	Ability to utilize various types of forms to initiate workflow, including but not limited to electronic forms, scanned paper forms, e-mails, and others as specified by CCCERA.			
1214	Workflow	Ability to produce all workflow reports defined by CCCERA, to include but not be limited to: all suspended work items, all work items in process, user-oriented work, queue-oriented work, all work processed through the system, quality related metrics, all completed work processes and the metrics and attributes associated therewith.			
1215	Workflow	Ability to route a work item back to the original worker by a reviewer so that the original worker can make the needed correction and/or changes; upon completion the item should route forward to the same reviewer.			
1216	Workflow	Ability to assign a work item to either a work queue or to a specific user.			
1217	Workflow	Ability for the system to identify those cases where the processing of a work item has been suspended for a defined period of time and create and/or forward the work item to the appropriate work process/unit for processing.			
1218	Workflow	Ability for the system to show the status of all Work Objects in the system by workflow processes and any sub-processes to include but not be limited to what activity and/or step it is in, who's working on it and when was it completed.			
1219	Workflow	Ability to adjust the flow of work items throughout the workflow to include but not be limited to reflecting organizational changes, changing process responsibilities and effective dates.			
1220	Workflow	Ability to age suspended work items and automatically route work items depending upon aging criteria based on CCCERA defined parameters.			
1221	Workflow	Ability to allow for reassignment of a work item that has been assigned, retrieved or reserved by an individual.			
1222	Workflow	Ability to attach and save notes, a standardized workflow review form, a standalone file to a work item and make the attachment visible to authorized users.			
1223	Workflow	Ability to build and integrate new workflows or modify existing workflows.			
1224	Workflow	Ability to administer user accounts assigned to work queues without interrupting the workflow processing.			
1225	Workflow	Ability to create defined workflow processes for all of those processes CCCERA elects to be workflow-enable.			
1226	Workflow	Ability to determine due dates for work items based on CCCERA defined criteria.			
1227	Workflow	Ability to interface the new imaging system to the new PAS or Workflow system so that indexed documents will trigger the appropriate workflow(s) in the new system.			
1228	Workflow	Ability to merge a work item created as the result of an incoming document to an already existing work item.			
1229	Workflow	Ability to perform version control of work flows, and the migration of work flow folders from one version to another to include but not be limited to documentation of changes made to the workflow processes.			
1230	Workflow	Ability to query on workload individually by process and/or by all processes to include but not be limited to daily, weekly, monthly, calendar year and fiscal year.			

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1231	Workflow	Ability to recognize if an account and/or folder needs special processing in another CCCERA work area; such as a member folder has a QDRO, POA, or another situation that requires review before any work can be done.			
1232	Workflow	Ability to recognize the Account Status in a member's database record, and generate and forward multiple work items for simultaneous processing by the appropriate work areas, based upon criteria defined by CCCERA, including but not limited to: the action or request of the member.			
1233	Workflow	Ability to record forms and documents received and correspondence sent and notify other workflows that are in-process			
1234	Workflow	Ability to support a checklist of documents that are required to process a work item within a particular work step / work process. The checklist must be updated, without manual intervention, as the notification of the documents is sent from the imaging system or as the result of a CCCERA user screen entry. (This is particularly useful when managing a suspended work item that awaits information from several sources.)			
1235	Workflow	Ability to support a document rendezvous capability such that a work process suspended while awaiting the receipt of additional information can be automatically resumed upon the receipt of that information (and recognition that the information may arrive as a paper document, an e-mail, or even a phone call)			
1236	Workflow	Ability to support a time-based alarm/reminder capability for follow-up tracking of functions within a workflow (e.g., non-receipt of the bank information within a definable number of business days) both in automatically generated correspondence to members who have not responded to requests for additional information and ticklers to staff who may need to provide personal follow-up on incomplete tasks			
1237	Workflow	Ability to temporarily suspend the processing of a work item because CCCERA is awaiting for information from an external entity and/or from an internal entity and then resume, without requiring manual intervention, the processing of that work item once the information has been received.			
1238	Workflow	Ability to utilize a Delegation of Authority feature that fully supplies the user environment with security of one member of staff to another for completion of work items owned, and maintenance of that member of staff's work items for planned and unplanned absences from work.			
1239	Workflow	Ability to display unique identifying member information on each screen when focused on a single member.			
1240	Workflow	Ability to collaborate or share information to another process or individual outside of the normal workflow process, with visibility as to who collaborated or shared the process.			
1241	Workflow	Ability to have visibility and/or disclosure of other work being performed, and notify the users of any changes occurring to a member account.			
1242	Workflow	Ability to handle conditional routing of a work item based on defined business purposes or state of work item attribute based on CCCERA defined parameters.			
1243	Workflow	Ability to simultaneously create and test multiple additional workflow routes without impact to other users performing the same task.			
1244	Workflow	Ability to release to production tested and verified modifications to workflow routes without significant impact to the production system.			
1245	Workflow	Ability to temporarily abandon an active work process in order to access another process without stopping the first process.			
1246	Workflow	Ability to capture work item-specific information at the completion of a workflow to include but not be limited to all process flow metrics, including dates, times and user names.			
1247	Workflow	Ability to assign work using a role-based model and/or direct user assignment.			
1248	Workflow	Ability to sort and select new work by multiple criteria to include but not be limited to first-in - first out, alphabetically, or priority of work item.			
1249	Workflow	Ability to monitor who has selected a work item and returned it to the work queue without further processing.			
1250	Workflow	Ability to interface with the PAS application to provide date-effective processing. Thus a staff member can enter the data associated with a change and specify that the change is to occur at a specified future effective date – and be assured that the change will take place on the specified date.			
1251	Workflow	Ability to change, modify, or alter maps to resolve bottlenecks and inefficiencies.			
1252	Workflow	Ability to securely manage additions and/or modifications to workflow parameters.			
1253	Workflow	Ability to integrate with the PAS in a seamless way (create actions by use of pull down menus, icons, and similar or related features) that can best be explained in the following example: When a member passes away, upon receipt of a death notice (by whatever means), a single workflow process is initiated that sends certain turnaround documents to the beneficiary for completion and return. The workflow must contain the appropriate steps to process and complete the entire operation. In addition, CCCERA management must be able to monitor the entire process via the workflow management solution.			
1254	Workflow	Ability to provide a user-friendly application environment that promotes pre-existing concepts already familiar to users to include but not be limited to the concept of file folders, attachments, assignments and the use of colors to show the status of an item at a glance.			
1255	Workflow	Ability to manually override the default system assigned priority, as well as the priority of an individual work item within a business process without the involvement of IT.			
1256	Workflow	Ability to generate both pre-defined and ad hoc reports of all system metrics and to support export of that data to include but not be limited to graphing.			
1257	Workflow	Ability to perform a simulation of a process to evaluate the potential effects of a change and/or enhancement.			
1258	Workflow	Ability to administer a work item on hold to include but not be limited to reporting against items on hold, restarting items that are on hold, rollback and notifying the individual who placed the item on hold.			
1259	Workflow	Ability to provide workflow tracking, statistics and process and/or user throughput reports.			
1260	Workflow	Ability to determine when a work item has exceeded the due date.			
1261	Workflow	Ability to cause a work item to follow an exception route as defined by CCCERA, when a work item has exceeded the due date.			
1262	Workflow	Ability for each workflow triggered by the new system to update the document tracking log as defined by CCCERA.			
1263	Workflow	Ability to return to and resume processing of the temporarily suspended work process, after the linked-to work process has been completed.			
1264	Workflow	Ability to fully automate rote tasks such as the acknowledgement of receipt of information or other member communication.			

ID #	Functional Area	Description / Requirement	Offeror Response: "We Agree" or "Not Met"	Offeror Response: Met as "B" (Base) or "C" (Custom)	Offeror Explanation / Reference / Notes
1265	Workflow	Ability to track the status of the business process from the receipt of triggering documents through completion for all business processes.			