



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
CPR11001

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
KRISTA FERRELL 304-558-2596

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

CONSOLIDATED PUBLIC RETIREMENT BOARD
 BUILDING 5, ROOM 1000
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0720 558-3570

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
05/23/2011				

BID OPENING DATE: 06/21/2011 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 3 TO ADD THE REVISED SPECIFICATIONS INADVERTENTLY OMITTED FROM ADDENDUM NO. 2 ***** END ADDENDUM NO. 3 *****		
0001	1	LS		920-49 FULLY INTEGRATED RETIREMENT SYSTEM FOR CPRB		
				***** THIS IS THE END OF RFQ CPR11001 ***** TOTAL:		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
 2. The State may accept or reject in part, or in whole, any bid.
 3. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
 4. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods this Purchase Order/Contract becomes void and of no effect after June 30.
 5. Payment may only be made after the delivery and acceptance of goods or services.
 6. Interest may be paid for late payment in accordance with the *West Virginia Code*.
 7. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
 8. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
 9. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
 10. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern the purchasing process.
 11. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
 12. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
 13. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at www.state.wv.us/admin/purchase/vrc/hipaa.htm and is hereby made part of the agreement. Provided that the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
 14. **CONFIDENTIALITY:** The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures, and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.
 15. **LICENSING:** Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, and the West Virginia Insurance Commission. The vendor must provide all necessary releases to obtain information to enable the director or spending unit to verify that the vendor is licensed and in good standing with the above entities.
 16. **ANTITRUST:** In submitting a bid to any agency for the State of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the State of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the State of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.
- I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, or person or entity submitting a bid for the same material, supplies, equipment or services and is in all respects fair and without collusion or Fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.
-

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division. Complete all sections of the quotation form.
2. Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Unit prices shall prevail in case of discrepancy. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
4. All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130
5. Communication during the solicitation, bid, evaluation or award periods, except through the Purchasing Division, is strictly prohibited (W.Va. C.S.R. §148-1-6.6).

Section 3.2.4.3

3.2.4.3 Specific Information about this Portion of the RFP

The matrices in the following subsections list the many detailed business function capabilities that the proposed integrated retirement system solution should provide.

The vendor's response must include a completely filled-in (a checkmark in one of the last three columns) matrix for each functional area in order to be considered for evaluation.

The column headings in the "To-Be" matrices are:

1. **Requirement ID** – an internal indicator of the specific requirement
2. **Description** – a detailed description of the requirement
3. **Highly Desire** – checked by WVCPRB if this is a highly desired requirement.
4. **Desire** – checked by WVCPRB if this is a desired requirement
5. **Exposed via Web** – checked by WVCPRB to indicate that functionality should be exposed (under appropriate security) to member / retiree / employer as appropriate
6. **Compliant** – checked by the vendor to indicate functionality included in the base product with no customization required. (Configuration of tabular parameters by user administrator or business analyst is acceptable herein.)
7. **Customize** – checked by the vendor to indicate functionality **not** included in the base product but to be provided to WVCPRB by a customization to the base product.¹
8. **Non-compliant** – checked by the vendor to indicate functionality is not currently included and will not be provided by customization. The vendor is warned that failure to respond in the affirmative to a highly desired requirement will greatly impact the scoring of the vendor's response.

To ensure that WVCPRB's selection of a vendor is adjudicated by the merits of the proposed solutions, one of the responses in columns 6-8 must be provided for each listed capability in the "To Be" matrices. Vendors are to check the appropriate columns in the matrix to indicate their response.

WVCPRB believes that the table-oriented approach used below for presentation of functional requirements is an appropriate method for succinct description of the requirements and for the vendor's response. However, the approach does not provide WVCPRB with a "feel" for how the functionality is provided. Therefore, even in those sections where no specific request is made for expansion on the requirements, in addition to completing the table, as appropriate, the vendor is requested to also provide a narrative description of the functionality provided in each specified functional area.

In an effort to make clear to the vendor the hundreds of functional requirements that WVCPRB has developed within this RFP, they are sub-divided in the sections that follow into three specific areas:

- Primary Business Functions, e.g., Employer Reporting
- Supporting Business Functions, i.e., those which are cross-functional areas such as Correspondence
- Technology-Based Business Functions, e.g., Imaging

Where applicable, the detailed functional requirements have been further divided into:

- Input
- Process

¹ Note that should the vendor propose that any required capabilities be provided through customization of the base product, the vendor is also required to describe how subsequent releases of the base product will incorporate those customizations – or otherwise ensure that WVCPRB loses no functionality when they upgrade.

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- Output
- Control
- Metrics.

WVCPRB has a vision that the new pension system will be rich in browser-based and web-enabled self-service functionality, providing ease of use not only to WVCPRB users, but also to members, retirees, beneficiaries, and employers. Specific implementation and/or policy decisions as to which web-enabled self-service features should be "turned-on" and "when" are to be discussed and agreed upon (typically by the vendor and WVCPRB project managers) throughout the course of the implementation project. As a result, the ability to support the timing of the initiation of the web-enablement of required functionality must be easily administered by a system administrator and not an IT specialist.

Vendors are to take note that web-enabled functionality – whether applicable to WVCPRB users or members or retirees or beneficiaries or employers – must be available on a near 24 X 7 basis (see Section 3.2.5.8.1.2). If some level of "downtime" is essential for system / Web-site maintenance and support, then the downtime period must be no greater than four (contiguous) hours per week on a pre-established schedule (e.g., every Sunday morning between 2:00 AM and 6:00 AM). Vendors are to explicitly state their agreement to meet this critical performance requirement in their technical proposals.

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3.2.4.4.6 Benefit Processing and Calculations

The vendor should note that a number of requirements provided below are checked as "Exposed via Web." Requirements under "Benefit Processing and Calculations" typically are oriented toward WVCPRB staff and management and not external parties. However, some requirements below (e.g., those that deal with initiating a workflow request for a benefit calculation, as well as others) are flagged as being "Exposed via Web." A more extensive list of Web-enabled requirements in this area is provided in Section 3.2.4.4.5 Benefit Estimates

Table 30: Functional Requirements for Benefit Processing and Calculations

REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
	INPUT						
1.	Ability to capture retirement application information (option selection, tax withholding, beneficiary, survivor annuitant, etc.)	•		•			
2.	Ability to record, track, and display the receipt of the benefit application	•		•			
3.	Ability to adjust audit percentages (or other criteria such as ID of staff member, employer report accuracy data, staff accuracy, etc.) for the application of audits without IT intervention		•				
	PROCESS						
4.	Ability to remove (in cases of retiree suspending pension and restoring to membership) retiree from Annuity Payroll and calculate amount of funds (benefits paid to date) to be returned to WVCPRB and display results and current payment status via portal	•					
5.	Ability for employers, via Web application, to enter termination dates, unpaid leave dates, last year of service, etc.	•		•			
6.	Ability for user to override benefit estimate parameters	•					
7.	Ability to age accounts / transactions to automatically generate follow-up correspondence since last activity (e.g.: after a configurable period of time, 30 days, 60 days, etc.)		•				
8.	Ability to automatically calculate gross annuity, disbursements, transfer amount and federal and state taxes according to business rules and laws and to update payroll and tax files as indicated by benefit calculations	•					
9.	Ability to configure the system to include business rules that are to automatically determine retirement special legislation "windows of eligibility" and apply to benefit calculations accordingly		•				
10.	Ability to automatically pre-fill user defined member information on all benefit calculation forms that are printed by WVCPRB staff and for those printed via the member over the web	•		•			

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
11.	Ability to automatically record receipt of benefits returned and update member's account	•					
12.	Ability to automatically invoice member for benefits overpayments		•				
13.	Ability to automatically run the interest posting job prior to processing a benefit calculation so that the benefit calculation is correct and up-to-date, but without actually updating the member account balance	•					
14.	Ability to calculate and apply the IRS 415 limitations to the benefit calculation	•					
15.	Ability to calculate and distribute two different annuities for two different periods of employment.	•					
16.	Ability to automatically calculate Final Average Salary in accordance with plan provisions, including all types of allowable service and including breaks in service	•		•			
17.	Ability to calculate retirement benefit using the service "buckets" (e.g., classes of service) defined in the WVCPRB member system	•		•			
18.	Ability to calculate the benefit for "hybrid" members and to automatically determine and use the appropriate final average salary when doing so.		•				
19.	Ability to closeout a member account for any trailing monies (contributions and interest) that may have been received after the initial or finalized benefit calculation and set up payment accordingly	•					
20.	Ability to create a benefit calculation for members who have service with multiple employers or plans within the same system and for split calculations (transfers and restorations), with the ability to view each calculation as well as the combined calculation	•		•			
21.	Ability to create an estimate for the Level Income Option incorporating information provided by the Social Security Administration regarding the member's projected Social Security benefit at age 62 and using level income factors based on individual's age at retirement from covered service	•		•			
22.	Ability to create appropriate tax records upon processing benefit calculation	•					
23.	Ability to define and enhance benefit calculation logic / specifications including changes due to legislation for calculating a final average salary, final contributions, final interest, final service, etc.	•		•			
24.	Ability to determine eligibility for all types of retirement (early, normal, disability, vested, death in service, accidental death, etc.) including calculation of comparison estimates	•					

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
25.	Ability to determine if member's 'intent to change' terms of retirement (e.g., date, option selections) was filed with WVCPRB within established timeframes		•				
26.	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	•					
27.	Ability to flag or delete incomplete benefit calculation information transactions when member rescinds retirement prior to retirement date or after intent to change process	•					
28.	Ability to follow up on flagged beneficiary, address, EFT changes that are pending		•				
29.	Ability to handle and apply both fiscal year end (June) and calendar year end (December) closing as it relates to benefit calculation and payroll	•					
30.	Ability to handle retroactive payments and disburse them in the same media as the normal pension payment	•					
31.	Ability to identify when the final salary, contribution, and service information have been reported by the employer		•	•			
32.	Ability to maintain at the participant and the summary level an excess benefit file in correspondence with IRS 415 (b) and (c) rules	•					
33.	Actuarial factors for administration are to be loaded in a table, with a separate table for each option for each plan. With update capability limited to designated high level users	•					
34.	Ability to perform benefit calculations under all applicable options (e.g.: Straight Life, 100% J&S, 50% J&S, 66 2/3% J&S, 10 Year Certain, True Joint & Survivor, Level Income) and the variable/customized options that WVCPRB supports using the appropriate factors. . Calculations must ensure that ages for retirees and beneficiaries are calculated correctly based upon calculation procedures adopted by the WVCPRB.	•					
35.	Ability to perform benefit calculations for early retirement options for all plans as applicable using the appropriate factors	•					
36.	Ability to perform retirement benefit calculations for all retirement systems in accordance with plan provisions	•					
37.	Ability to provide a checklist detailing which retirement application documents have been sent, received, and/or which are still outstanding	•		•			

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
38.	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	•		•			
39.	Ability to provide reason and reason code for any overpayments (drop down box/free form) so that users can explain situations without other users having to review the detailed transactions	•					
40.	Ability to support existing special member contribution classes (Law Enforcement, Appellate Court Judges, Elected Officials, Temporary Legislative Employees)	•					
41.	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 (e.g., option changes received before retirement date)	•					
42.	Ability to update member demographic data with new information (name change, address, etc) during benefit calculation process or direct to different work queue if necessary (SSN changes)	•		•			
43.	Ability to verify / cross-reference the termination date provided on the retirement application against the termination date transmitted from the employer, and if a discrepancy exists, notify WVCPRB end-user		•				
44.	Ability, in case of underpayment, to issue supplemental "catch-up" payment	•					
45.	Ability, in the case of overpayment, 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	•					
46.	Ability to add a new individual to pension annuity payroll and transfer information to an "auditor" via workflow for an approval step; only after the approval process, officially place the individual on annuity payroll	•					
47.	Ability to automatically determine and apply actuarial reduction and loan offset reduction to monthly benefit	•					
48.	Ability to calculate new monthly benefit under all options based on the appropriate factors	•					
49.	Ability to determine and capture the prior service allowance of a monthly benefit	•					
50.	Ability to compare an estimated benefit amount versus a final benefit amount automatically without the user having to re-enter or re-calculate this information			•			
51.	Ability to determine date of conversion from disability to service retirement and capture both dates of retirement	•					

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
52.	Ability to determine, calculate and apply exclusion ratio/excludable amount if the adjustment is a result of additional contributions received	•					
53.	Ability to provide an online Web utility for WVCPRB retirees to calculate/estimate the effects of various federal and state withholding tax amounts		•	•			
54.	Ability to provide an online Web utility for WVCPRB retirees to view/print benefit summary information	•		•			
55.	Ability to automatically recalculate a benefit amount based on a change in personal data	•					
56.	Ability to re-calculate and post interest to members' accounts for a user defined period at a plan, contribution group, department or member level	•					
57.	Ability to recognize a change to the member's account and trigger a post-retirement adjustment workflow with the ability (if WVCPRB desires) to have the system perform the re-calculation of benefits and the comparison of benefit amounts	•					
58.	Ability to setup, process and transfer a benefit wherein the member qualifies for and elects to switch type of disability	•					
59.	Ability to transfer the collection of an overpayment deduction from a disability account when converted to a regular retirement and vice-versa	•					
60.	Ability to update benefit amounts and issue a supplemental payment to "catch up"	•					
61.	Ability to automatically calculate the Social Security Offset as required by the Retirement Social Security Law	•					
62.	Ability to calculate actual distribution to mandated payee(s) and initiate distributions with initial pension payment	•					
63.	Ability to fully automate the calculation of restoration benefits	•					
64.	Ability to fully, automatically recalculate a benefit using all the appropriate information, regardless of the "state" of the member/retiree	•					
65.	Ability to capture audit results and statistics and generate appropriate feedback and reports	•					
66.	Ability to calculate and store for appropriate use in future benefit calculations benefit information associated with date of retirement and choice of various retirement options	•					
67.	Ability to calculate the amount of funds to be returned by a financial institution in order to recoup the overpaid rollover / direct deposit amount	•					

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
68.	Ability to ensure under certain circumstances that certain retirements from multiple plans do not exceed a sum total of 105% of highest earnings from either employer	•					
69.	Ability to capture reasons for inaccuracies or incompleteness on the retirement application and / or other related documents		•				
70.	Ability to enter audit messages explaining what changes / corrections need to be made by a WVCPRB user when auditor returns work after completion of audit pass		•				
71.	Ability to notify auditors of various case specifics / special situations prior to their auditing work / accounts		•				
72.	Ability to return record for changes if verification unsuccessful	•					
	OUTPUT						
73.	Ability to generate a member "Recomputation correspondence" detailing the under or over payment of benefits and the steps that are to be taken to either recoup the overpayment or provide a "catch-up" payment to offset the underpayment		•				
74.	Ability to generate an employer form 7-14 days prior to retirement to verify the number of hours worked, the member's gross wages, and the contributions for the last month of employment		•				
75.	Ability to generate correspondence to member acknowledging receipt of payment for any overpayment or other receivable due		•				
76.	Ability to produce a "Return Funds" correspondence to a financial institution to recoup the overpaid rollover / direct deposit amount		•				
77.	Ability to produce system generated correspondence informing new retirees of their benefit		•				
78.	Ability to support the generation of retirement application kits containing a cover correspondence and all necessary forms appropriate to the member's situation (retirement application, rollover, beneficiary nomination, etc.)		•				
79.	Ability to generate correspondence notifying the member of options available in the event of an adjustment		•				
80.	Ability to generate correspondence to accompany 1st check for new retirees	•					
81.	Ability to generate correspondence to the retiree explaining the disposition of accounts receivables against his/her disability account when converted to another disability or regular (service) retirement		•				

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
82.	Ability to generate correspondence requesting additional documentation (death certificate, divorce decree, marriage certificate, proof of date of birth of new survivor annuitant)		•				
83.	Ability to create appropriate tax records upon processing benefit calculation	•					
84.	Ability of manager to monitor flagged and outstanding items.	•					
CONTROL							
85.	Ability for certain designated high level users to create, update and maintain retirement age and factor tables (dollar annuity value, early retirement factor, option factors, joint-and-survivor factor, etc.)	•					
86.	Ability to release record for payment only after benefit calculation is verified / audited	•					
87.	Ability to route all types of benefit calculations to an audit pass in accordance with WVCPRB business rules and operational procedures	•					
88.	Ability to validate all record changes against existing business rules	•					
89.	Ability to identify if a refund application or disability retirement application has also been filed and if so trigger appropriate workflow	•					
METRICS							
90.	Ability to (track information and) generate report identifying number of retirement calculation requests received, dates received, date completed, and by whom		•				
91.	Ability to create a final Calculation Performance Timeline including , but not limited to, the following: <ol style="list-style-type: none"> 1. Retirement Counseling - Date and Staff ID. 2. Retirement Application - Date submitted. 3. Verification of employee submitted information - Date and Staff ID. 4. Additional Information letter to EE – Date and Staff ID. 5. Request to ER for final report for EE – Date and Staff ID. 6. ER final report – Date submitted. 7. Final Calculation Assignment – Date assigned and to whom. 8. Final Calculation Review – Date submitted for supervisor review, and to whom. 9. Final Calculation Corrections – Date returned to staff for calculation corrections. 10. Final Calculation Secondary Review – Date corrected calculation was returned for review. 		•				

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Section 3.2.4.5.3

3.2.4.5.3 General

The following section presents requirements that span functional areas. In particular, the vendor is reminded that the proposed solution must allow for overrides/corrections/reversals of system-calculated (or otherwise provided) results.

Table 52: Functional Requirements for General

REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
	INPUT						
1.	Ability to record receipt of all process-specific forms received throughout any process (for example, in the death process, death certificate, next-of-kin affidavit, annuity election form, tax forms, rollover form, etc.) and ability to capture pertinent information from each document/form and to automatically generate correspondence to the sender acknowledging receipt	•		•			
2.	Ability to capture and accept digital signatures that conform to federal and state statutes	•		•			
3.	Ability to capture manual notes at a variety of levels within the database structure including (but not limited to) member and workflow work items, and to provide adequate security as defined by WVCPRB.	•					
4.	Ability to support the import of data from other external Open Database Connectivity (ODBC) compliant sources		•				
5.	Ability to add, update, delete international as well as domestic addresses	•		•			
6.	Ability to capture, maintain, inquire, and print the following address types for a member: multiple e-mail addresses, multiple mailing addresses, bank address, electronic transfer address (routing number), power-of-attorney address, physician address, hospital address, attorney address, POA address, guardian address, temporary addresses, beneficiary address, and alternate contact address, etc. that are date sensitive; dates for each address can be participant defined and updated; require entry of at least one postal address	•		•			
7.	Ability to perform and communicate "real-time" validations and the return of entry errors on ALL user and external customer interfaces and the revalidation of "real-time" corrections	•		•			
8.	Ability to initiate, based on an incoming image, the account creation or enrollment process for any entity (member, beneficiary, employer, other, etc.) that does not already exist. Also, ensure all images are automatically indexed/reindexed to the new entity's ID.			•	•		

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
9.	Ability to validate addresses in real time via a web-service		•	•			
10.	Ability to capture and maintain valid data values by field and specify date effective and date no longer effective	•		•			
11.	Ability to validate input using only effective field values	•					
12.	Ability to automatically acknowledge receipt (but not necessarily acceptance/approval) of a member (or other party) submitted document upon scanning		•	•			
13.	Ability to automatically acknowledge acceptance (form is correct, information complete, etc.) of a received document in process (if appropriate) in the context of a particular business process		•	•			
14.	Ability to support adequate field lengths in all database fields	•		•			
	PROCESS						
15.	Ability to provide remote / Web access to the line-of-business system for any out-of-office work including counseling sessions, seminars, workshops, etc	•		•			
16.	Ability for the reviewer to assign a reason for the return of the account/folder (i.e., error, inquiry, or additional information required)	•					
17.	Ability to automatically identify those accounts/processes where no response was received from a follow-up correspondence after a WVCPRB defined time period and provide appropriate follow-up / notification	•		•			
18.	Ability to route work for audit / review prior to release for action; if "errors" are found, route the account/folder to the original processor and (after correction) from the original processor to the original reviewer	•					
19.	Ability to track the distribution, turn-around, and processing of each document used in any processing	•					
20.	Ability to add benefit adjustment reason type and code	•					
21.	Ability to accept and process submitted requests received through a Web utility	•		•			
22.	Ability to accommodate parameters that vary among plans, employers, etc.	•					
23.	Ability to add a new plan to the system, to modify an existing plan (Including versioning of the plan), and to freeze an existing plan so that no one can become a member	•					
24.	Ability to allow for varying data structures (i.e., not forcing a single "name" structure or "address" structure) based upon the business	•					

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
	need for that information and the type of correspondence to be generated						
25.	Ability to allow members / affiliates to access their account data via the Web	•		•			
26.	Ability to automatically notify appropriate users that the specified "wait" period has been exceeded for a response from a user, employer, etc.		•				
27.	Ability to calculate the member's "age" within the system for various purposes;	•					
28.	Ability to close existing plans to new members, to later reopen them, and to capture and apply the dates of the open and closed periods	•					
29.	Ability to comply with all applicable external rules and regulations (e.g., WVCPRB, WVOT, HIPAA, IRS, US Postal Service, etc.) that are defined for a period of 24 months after contract signing	•					
30.	Ability to comply with all applicable federal and state tax laws and statutes	•					
31.	Ability to control result of locking an account – e.g., allow the addition of images to the folder of a member whose account is locked while not allowing data changes or deletion of images; alternatively, prohibit addition / deletion of images and data changes to a locked account		•	•			
32.	Ability to create queries using standard English language requests.	•		•			
33.	Ability to enter data into the system and set its status to "pending" (also keep its status of "pending" in workflow) for those cases where a document comes in before the document that should have arrived first to initiate the process	•					
34.	Ability to have and maintain (add, edit and delete) 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	•					
35.	Ability to maintain holiday, annuity payroll, closing calendars for processes	•					
36.	Ability to maintain those table-values (i.e. tax tables, service credit factors, interest rates, etc.) that are more complex than simple list-values via a standard user-interface	•					
37.	Ability to match entered data with database values without regard to case – i.e., a system that is NOT case-sensitive	•		•			

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
38.	Ability to navigate through screens based on standard Windows and/or Browser based navigation	•		•			
39.	Ability to navigate through screens using Hot Keys and retain the key identifier (e.g., Social Security number) throughout	•		•			
40.	Ability to pre-populate city and state by first entering the ZIP code and allow for overriding of the city and state, without consequently altering the ZIP code, when necessary	•					
41.	Ability to prevent the entry of duplicate transactions, when appropriate	•					
42.	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	•					
43.	Ability to provide a "mass" data entry capability that which permits users to execute a large number of "like" transactions in a "short-cut" fashion, i.e., mass change (e.g., COLA, interest) based on query	•					
44.	Ability to provide a common error handling mechanism, including error correction, recovery processing, and related quality control procedures and processes		•				
45.	Ability to perform queries without negatively impacting production environment performance	•					
46.	Ability to provide data quality determination and analysis	•					
47.	Ability to query and print the history of all changes, showing before and after values, as well as when the change was made and by whom	•					
48.	Ability to reopen closed plans	•					
49.	Ability to restore archived data or specific members or groups of members, and/or based on distinct time periods	•					
50.	Ability to size and adjust all screens and have their settings saved at the workstation level so end-users can display/position screens based on business needs			•			
51.	Ability to store, retrieve, and print all parameters used, calculations performed, and corresponding results for all calculations	•					
52.	Ability to subtotal member history by different time frames (e.g., month, quarter, years, rolling time frames, etc.)	•		•			
53.	Ability to support foreign addresses	•		•			
54.	Ability to track, archive, and manage phone calls as electronic correspondence		•				
55.	Ability to support name in at least five distinct components – title, first,	•		•			

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
	middle, last and suffix						
56.	Ability to support various error level severities (warning, fatal, etc.)	•					
57.	Ability to support various types of transaction and status codes throughout the system	•					
58.	Ability to tie the data to the system's ad hoc query and reporting functions	•					
59.	Ability to use soundexing, partial field values and/or wild cards for lookups in key fields	•					
60.	Ability to maintain a historical list of employer location code conversion / consolidation	•					
61.	Ability to accommodate (store and apply) future changes (e.g., name change, address change, tax withholdings, direct deposit information, etc.), all with effective dates, as well as search on historic values.	•					
62.	Ability to edit/validate incoming data formats from employer and other WVCPRB affiliates (e.g. numeric, field size, physical file attributes, etc.)	•					
63.	Ability to identify and track the status of all people/entities in the database (vested, active, inactive, inactive vested, retired, beneficiary, surviving beneficiary, etc.)	•					
64.	Ability to search on Social Security number, unique ID, employee registration number, or name, etc. with the additional capability to use wild card characters	•					
65.	Ability to sort addresses for mass mailings by various values including last name, first name, member ID, elements of address, retirement system, employer, etc.	•					
66.	Ability to do advanced searches using any field within the database such as date of birth, retirement date, name, city, street address, and with combinations of these fields	•					
67.	Ability to systematically change Social Security offset rate table and wage base table set by the Federal Social Security Administration using an on-line program (this is necessary to calculate Joint Coverage members' contributions after they reach the Social Security maximum salary)	•					
68.	Ability to, upon adding a new plan, link it to every module and database that requires information for record keeping, general accounting, and correspondence tracking.	•					
69.	Ability to transfer members between plans both on an individual basis (i.e., one member at a time) and en masse (i.e., the user may specify	•					

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
	that all or some existing members of a given plan, or all or some employees working for a particular employer, are to be transferred to another existing plan)						
70.	Ability to enable transfers of service credit or money for an individual or an employer between two plans or retirement systems, etc.	•					
71.	Ability to retrieve (using a single query) all archived correspondence (and all imaged records if imaging has been integrated) that meet a single query. That is, the user should not have to make one query to retrieve archived member correspondence and a second to retrieve archived images	•					
72.	Ability to associate a member with the possibility of having multiple plans available based on different criteria	•					
73.	Ability to provide business area-specific, generally accessible calendaring capability, managing resources, availability, etc., and generating appropriate triggers/reminders	•					
74.	Ability to support searches that are and are not case-sensitive	•					
75.	Ability to maintain any query capability given updates to the LOB schema definitions	•					
76.	Ability to provide query capability without negatively impacting production environment performance	•					
77.	Ability to use one interface for all ad hoc query and reporting functions thus minimizing training and maintenance costs	•					
78.	Ability to include the same data edits, validations, and error handling for data entered through the "Mass update" facility as if the transactions were entered one at a time.	•					
OUTPUT							
79.	Ability to "age" death benefit accounts for the purpose of automatically generating follow-up correspondence, i.e., a "simple" cover correspondence explaining that a prior correspondence was sent (mm/dd/yyyy) and that WVCPRB is still waiting for a response with a copy of the original correspondence attached		•	•			
80.	Ability to generate an additional information correspondence (automatically where possible) indicating the need for further information needed to process a payment, a benefit, an application, etc.; include appropriate forms to be sent with the correspondence		•	•			
81.	Ability to generate various prefilled (e.g., member, survivor annuitant, and/or beneficiary information) documents	•		•			
82.	Ability to automatically generate and send follow-up correspondence		•	•			

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REQUIREMENT ID	DESCRIPTION	HIGHLY DESIRE	DESIRE	EXPOSED VIA WEB	COMPLIANT	CUSTOMIZE	NON-COMPLIANT
	regarding non-receipt of information a configurable number of days after the form or request was sent (include copy of the original form) and the due date						
83.	Ability to generate acknowledgement of receipt of any of several applications along with any necessary follow-up correspondence to member		•	•			
84.	Ability to display basic member information on all applicable application screens and have the information displayed in various text cases and styles as required	•		•			
85.	Ability to display monetary amounts in whole dollars or dollars and cents-and the flexibility to perform rounding and reduce the amount if desired	•		•			
86.	Ability to provide online, context-sensitive error and help messages/screens	•		•			
87.	Ability to support screen prints for all windows	•		•			
88.	Ability to reprint/resend any correspondence on an as needed individual basis in any available format (e.g., paper, email, fax)	•		•			
89.	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 Americans with Disabilities Act [ADA] - compliant).		•	•			
90.	Ability to navigate from field, element, or control level help with a single click to the broader, screen or process level help.		•	•			
91.	Ability to support on-line process help tutorials and the provision thereof		•	•			
92.	Ability to provide tools and methods for maintaining version control of on-line help.		•	•			
93.	Ability to support WVCPRB updates, additions, and deletions to all forms of on-line help, including the context-sensitive form and the on-line tutorials. Provide the capability for WVCPRB to augment the actual text or video with links to the relevant rules and policies in relationship to the context – and to change or update those links as necessary.	•		•			
94.	The ability to include on-line help and an area for frequently asked questions (FAQ) on employer and member web self service screens and processes.		•	•			
95.	Ability to store all captured correspondence in immutable format (300	•		•			

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	dpi, TIFF 6.0 or locked PDF or ...) so that it cannot later be altered in any way						
96.	Ability to provide services to those who are disabled	•		•			
	CONTROL						
97.	Ability to enforce edits on addresses based on postal regulations and have those edits prompt users to follow the standard prior to successful update; also if a user enters a zip code, the system should pre-fill the corresponding city and state (and allow overwriting of same without validation against the ZIP code); the system should ensure synchronization so if a user enters (St., Street, street or st.) the system should convert it to a single standardized format	•		•			
98.	Ability to provide end-to-end performance monitoring and control	•					
99.	Ability to capture, maintain, inquire and display multiple transactions (address, employment information, etc.) of the same type with effective dates	•		•			
100.	Ability to support multiple phone numbers that are date and time sensitive; dates and/or times for each number can be participant defined and updated	•		•			
101.	Ability to create wizards that guide the user/customer through the completion of any screen or process	•		•			
102.	Ability to identify and reverse any customer-related operation or set of operations that resulted in a disbursement when the recipient of the disbursement refuses the transaction, e.g., does not cash the check, does not accept the deposit. This includes, for example, the ability to reverse a loan transaction for which WVCPRB did not already receive and process employer-withheld repayments of the loan if the member decides to return the check uncashed. The automatic reversal is to also include the creation of an appropriate audit trail and generation of all appropriate correspondence and notifications to impacted customers	•		•			

Section 3.2.5.6.5.2

3.2.5.6.5.2 Network Software

Proposed Network Software must be consistent with the Network Architecture discussion in Section 3.2.5.3.7. Vendors should propose the most current and appropriate version of the following network system software or equivalent alternate software of greater functionality:

- Network operating system to support WVCPRB end users, including remote dial in access users, plus vendor development personnel
- Ability for non-WVCPRB personnel (such as visitors, vendors, and trainers) to use the WVCPRB network for Internet access only
- Other software as proposed, discussed, and specified by the vendor, including but not limited to test script generators and drivers
- Hub or Ethernet Switch software.

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Section 3.2.5.6.5.3

3.2.5.6.5.3 Network Management Software

This Section has been deleted from the RFP.

Section 3.2.6.3.10

3.2.6.3.10 Risk Management

Risk management includes identification, analysis, planning, tracking, control, and communication of risk areas associated with all project phases. Risk assessment and management are on-going tasks in any project. The vendor must demonstrate that it can provide a risk management (analysis and mitigation) strategy and methodology that can be used throughout the project to monitor potential risks and to develop mitigation strategies in anticipation of any problems that may arise. Then, based on feedback, assessments can be updated on a continuing basis for the duration of the project. While some risks can be identified from the outset of a project, others will emerge in the course of the project's life cycle.

The risk management strategy and methodology shall address how the vendor proposes to accomplish the following:

- Define measures of success and set targets
- Identify key assumptions
- Identify, analyze, and document risks that threaten the ability to achieve the success targets
- Develop and document mitigation strategies for each identified risk
- Specify tasks to implement the mitigation strategy
- Build consensus on appropriate mitigation strategies
- Establish criteria for escalating risks
- Enlist support for mitigation steps that are outside of the project's direct control
- Monitor and report on risks.

Further, as a part of their response, the vendor should provide a list of the top twenty risks they currently foresee with this project, their assessment of the probability of their occurrence, and the steps they will take to avoid or mitigate those risks.

At key points in the project cycle and no less frequently than quarterly, the successful vendor will be required to conduct formal risk assessments, to review the status of project risks to ensure that appropriate mitigation strategies are in place and to report on the project's risk status.

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Section 3.2.11.3.3

3.2.11.3.3 Life Cycle Testing

Complete Life Cycle Testing (LCT) will be conducted prior to the final cutover to the new solution. Test and validation of the accuracy of the data conversion and bridging process will be conducted prior to Life Cycle Testing (see Section 3.2.7.2 Data Conversion and Bridging and Figure 10 Phased Data Conversion and Bridging for additional information). LCT will immediately follow the successful completion of Business Process testing during the rollout of each phase. The vendor will develop a plan for LCT and develop all test materials. The vendor will itself conduct the LCT and certify its successful completion prior to turning LCT test materials over to WVCPRB users for their LCT activities.

LCT will consist of the execution of a series of well constructed test cases designed to simulate a member's full life cycle from initial enrollment through his/her retirement, eventual death, and distribution of death benefits to beneficiaries. It will address, at a minimum, the following test scenarios / cases:

- Receipt of employer wage and contribution report for new member having no enrollment information in the system
- Automatic "triggering" of the appropriate response to that event related to the new member's enrollment – i.e., upon receipt of the wage and contribution report, generation of a workflow stream for WVCPRB staff to send an enrollment form to the new member, or automatically enroll the new member, or ...
- Receipt of the completed enrollment form and entry of all enrollment information into the system
- Identification of incomplete information on the enrollment form and automatic "triggering" of a request for additional information from the member
- Receipt of the additional information and entry of the related data into the system, completing the enrollment process
- Periodic receipt and posting of additional employer wage and contribution data for the member
- Periodic posting of interest to the member's account
- Receipt and entry of updated beneficiary information
- Receipt, entry, and calculation of a loan
- Receipt of notification of member's termination of employment
- Receipt of member's refund application, including rollover information
- Calculation of amount to be refunded to terminating member including potential loan offset
- Audit / review of refund calculation
- Generation of (partial) refund check to member
- Processing of rollover of portion or all of a refund to member's financial institution
- Receipt of final wage and contribution information for member
- Calculation of remaining balance to be refunded to member
- Generation of check for amount of remaining balance
- Confirmation that account has been "zeroed" – both contributions and service credit
- Receipt of employer (different from original employer) wage and contribution for the terminated member
- Processing of return to work in a covered position by the member
- Re-enrollment of the member

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Section 3.2.11.3.3

- Receipt of application to buy back refund from previous period of membership
- Calculation of eligible service credit and cost of buyback, including interest
- Audit / review of buyback calculation
- Generation of letter to member with buyback information
- Receipt of buyback check from member (and/or roll-in of funds from financial institution qualified retirement account)
- Posting of service credit and contributions to member account reflecting buyback of previous service by member
- Receipt of application from member to purchase eligible service
- Entry of purchase of service information into system
- Calculation of cost of purchased service
- Audit / review of purchase of service calculation
- Generation of letter to member with purchase of service information
- Receipt of check from member to purchase service
- Posting of service credit and contributions to member account reflecting purchase of service
- Receipt of notice of death of one of member's designated beneficiaries
- Adjustment of allocation of member's death benefit to remaining beneficiaries
- Receipt of application for retirement from member
- Identification of incomplete information and/or required documents (e.g., date of retirement, birth certificate) to process retirement application
- Generation of letter to member requesting missing information / documents
- Receipt and entry into system of missing information / documentation
- Calculation of member's final average salary
- Audit / review of final average salary and initial retirement benefit amount
- Generation of retirement benefit estimate letter to member
- Transfer of member from active membership to retired status
- Receipt of final wage and contribution information for member
- Calculation of final retirement benefit amount including potential loan offset
- Audit / review of final retirement benefit amount
- Generation of first retirement benefit check / direct deposit / EFT
- Receipt of notice of retiree's divorce (QDRO)
- Calculation of benefit split between retiree and former spouse
- Audit / review of benefit split
- Receipt of notice of death of retiree
- Calculation of death benefit (lump sum or monthly annuity) for each beneficiary
- Audit-review of death benefit calculation

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- Generation of check for lump sum death benefit to each qualified beneficiary
- Addition of qualified beneficiary to retirement annuity payroll in case of monthly annuity
- Close out of retiree's account
- Receipt of notification of death of last beneficiary
- Close out of beneficiary account
- Correct handling and accounting for basis recovery
- Correct accounting for required minimum distribution
- Production of 1099R, reprint of same, and production of data file for submission to IRS.
- Ability to accept multiple wage reports for a member – a member who works in two or more positions at the same employer or in two or more positions at separate employers.
- Ability for an elected official to terminate one WVCPRB covered job and still remain in his or her elected position and receive a retirement allowance
- Correct calculation and application of interest, COLAs, and other benefit adjustment and offsets
- Supplemental payments
- Ability of holds and flags place on a member's account to genuinely restrict access to or activity in the account.

LCT must also include a test stream addressing disability versus regular retirement of the member. Additional test scenarios / cases that must be addressed in this version of LCT are to include:

- Receipt of application for disability retirement from member
- Entry of disability retirement application information into system
- Identification of incomplete information on the disability application and automatic "triggering" of a request for additional information from the member
- Receipt of the additional information and entry of the related data into the system
- Calculation of potential disability benefit amount
- Audit / review of potential disability benefit amount
- Scheduling of physician's exam
- Receipt of physician's report on member's disability
- Preparation of disability case materials for presentation to disability oversight authority
- Processing of denial of application for disability benefits and generation of denial letter to applicant, including information on rights to appeal decision
- Receipt of member's appeal of disability decision
- Processing of reversal of denial (approval) of disability benefits
- Generation of letter to member authorizing disability retirement, informing member of disability benefit amount and member's responsibilities for periodic re-certification of disabled status and reporting of earnings
- Generation of disability retirement benefit checks / direct deposits / EFTs
- Receipt of disability retiree's annual earnings information
- Automatic comparison of reported earnings against allowable earnings

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- Calculation of automatic reduction of disability benefit based on retiree's having exceeded allowable earnings amount
- Audit / review of disability benefit reduction
- Generation of disability retirement benefit checks / direct deposits / EFTs in new (reduced) amount
- Receipt of physician's report indicating disability status no longer applicable
- Generation of letter to disability retiree indicating potential termination of disability benefits, with information on appeal process
- Automatic removal of retiree from disability annuity payroll based on failure to comply
- Receipt of appeal information indicating continuing disability after suspension of disability benefits
- Resumption of disability benefits based on successful appeal
- Calculation of "catch-up" amount to compensate disability retiree for period when benefits were suspended
- Audit / review of "catch-up" amount calculation
- Generation of check / direct deposit / EFT for "catch-up" amount
- Automatic "triggering" of disability retiree's benefit reversion calculation (based on age)
- Generation of letter to retiree informing him/her of benefit reversion calculation

As mentioned elsewhere in this RFP, the vendor will be required to provide an independent test team composed of vendor staff who had no hand in developing the system under test. That independent test team will be continuously present and available to assist the WVCPRB users in meeting their LCT responsibilities.

In addition to assisting WVCPRB users in utilizing the test materials and executing the tests, the vendor's independent testing team will also support users in reporting test results and in re-testing, as required, to confirm that all Problem Incident Reports were addressed correctly and thoroughly.