The requirements and deliverables to be provided by the Bidder are listed in this RFB and in Form B. The requirements and deliverables listed in this RFB and in Form B are mandatory, unless otherwise noted, and must be provided by all Bidders/Contractors. **Failure to comply with one or more of the mandatory requirements in Form B may disqualify a Bid. A response to each item on Form B is a mandatory requirement, and failure to respond with either “agree” or “disagree” to everything listed may result in a Bid being rejected.** If a Bidder cannot agree to each item listed in Form B, the Bidder must so specify and provide a reason or justification in Bid TAB 2 – Assumptions and Exceptions – of the Bid response. ETF may consider the issue if it is addressed in Bid TAB 2. Even if addressed in Bid TAB 2, a “disagree” to a mandatory requirement may still result in a Bid being rejected.

**Instructions:**

1. Read the listed requirements.
2. Check “Agree” or “Disagree” to each requirement as appropriate.
3. Complete the “ACKNOWLEDGE AND ACCEPT” section:
* Print company name.
* Print the name of the representative signing this Form (must be authorized to legally bind the company).
* Sign this form.
* Date this form.
1. Submit this form as part of the Bid (TAB 1).

|  |
| --- |
| **Mandatory Business Requirements** |
| **Mandatory Technical Requirements** |
| **Additional Requirements (Not Mandatory)** |
| **Agree** | **Disagree – Put Reason in TAB 2** | **Requirement Number** | **Requirements** |
|  |  |   | **Solution Calendar Set up and Maintenance** |
| [ ]  | [ ]  | RQ 1 | Admin user(s) need the ability to **set** the rules that control the requirement of fields during an appointment creation, i.e. phone number is required. |
| [ ]  | [ ]  | RQ 2 | Admin user(s) need the ability to **edit** the rules that control the requirement of fields during an appointment creation, i.e. phone number configured as required and then it is determined that it no longer needs to be required. |
| [ ]  | [ ]  | RQ 3 | Admin user(s) need the ability to make an open/available appointment slot unavailable if Member Services specialist becomes unavailable as an exception to the template. |
| [ ]  | [ ]  | RQ 4 | Admin user(s) need the ability to edit the business rules for all appointment types through the solution on an exception basis including length of appointment slots and day of appointment. |
| [ ]  | [ ]  | RQ 5 | Admin user(s) need the ability to **edit** the rules on what member information is included in the appointment sent to the Member Specialist Outlook calendar. |
| [ ]  | [ ]  | RQ 6 | Solution must allow admin user(s) to create a template to configure calendar for appointments of all types and locations at a minimum of once a year including: setting up unlimited locations for outreach appointments, creating member specialists availability, setting parameters for appointment availability, creating business rules for all types of appointments. |
| [ ]  | [ ]  | RQ 7 | **Solution** must have the ability to open appointments when Member Services specialists availability is confirmed (for all appointment types other than Outreach) on a six-week rolling schedule (TIME FRAME IS FLEXIBLE). |
| [ ]  | [ ]  | RQ 8 | Admin user(s) need the ability to edit the locations for outreach appointments through the solution on an exception basis. |
| [ ]  | [ ]  | RQ 9 | Admin user(s) need the ability to **set** the rules on what member information is included in the appointment sent to the Member Specialist Outlook calendar. |
| [ ]  | [ ]  | RQ 10 | Admin user(s) need the ability to edit the parameters for appointment availability through the solution on an exception basis. |
| [ ]  | [ ]  | RQ 11 | **Admin user(s)** need the ability to close available appointment slots within 10 days of the appointment date if the appointment is not filled **on an exception basis.** |
| [ ]  | [ ]  | RQ 12 | Admin user(s) need the ability to edit the Member Services specialists availability through the solution on an exception basis. |
| [ ]  | [ ]  | RQ 13 | Member ID must be a required field for all appointment types. |
| [ ]  | [ ]  | RQ 14 | **Solution** must have the ability to open Outreach appointments when Member Services specialists availability is confirmed on a quarterly schedule (TIME FRAME IS FLEXIBLE). |
| [ ]  | [ ]  | RQ 15 | **Admin user(s)** need the ability to open Outreach appointments, **on an exception basis**, when Member Services specialists availability is confirmed on a quarterly schedule (TIME FRAME IS FLEXIBLE). |
| [ ]  | [ ]  | RQ 16 | Call Center agent must not have the ability to change calendar templates including: locations for outreach appointments, member specialist’s availability, parameters for available appointments, business rules for all types of appointments. |
| [ ]  | [ ]  | RQ 17 | **Admin** **user(s)** need the ability to open appointments, **on an exception basis**, when Member Services specialists availability is confirmed (for all appointment types other than Outreach) on a six-week rolling schedule (TIME FRAME IS FLEXIBLE). |
| [ ]  | [ ]  | RQ 18 | Member name must be a required field for all appointment types. |
| [ ]  | [ ]  | RQ 19 | Member phone must be a required field for all appointment types. |
| [ ]  | [ ]  | RQ 20 | Admin user(s) must have the ability to set the number of members that can be scheduled in each group appointment slot. |
| [ ]  | [ ]  | RQ 21 | **Solution** must have the ability to close available appointment slots within 10 days of the appointment date if the appointment is not filled. |
| [ ]  | [ ]  | RQ 22 | Member email must be a required field for all appointment types. |
|  |  |   | **Member Services Specialist Calendar Maintenance** |
| [ ]  | [ ]  | RQ 23 | Solution must have ability to remove appointment from Member Services specialists Outlook calendar in the event of a cancellation. |
| [ ]  | [ ]  | RQ 24 | Solution must have ability to add an appointment to the selected Member Services specialists Outlook calendar upon saving the appointment in the solution. |
| [ ]  | [ ]  | RQ 25 | Solution must have ability to notify, by email, the Member Services specialist in the event of a cancellation. |
|  |  |   | **Appointment Scheduling** |
| [ ]  | [ ]  | RQ 26 | Call Center agent must have ability to **edit** member information already stored in the solution while scheduling an appointment including: name, Member ID, phone # and email address. |
| [ ]  | [ ]  | RQ 27 | Call Center agent must have ability to reschedule appointments for members of all types and locations including type, location, specialist, time, day of the week and date. |
| [ ]  | [ ]  | RQ 28 | Call Center agent must have ability to cancel/remove existing appointments for members of all types and locations. |
| [ ]  | [ ]  | RQ 29 | Two Call Center agents should not be allowed to schedule two or more members to the same appointment slot for all appointment types except group appointments. |
| [ ]  | [ ]  | RQ 30 | Call Center agent needs to receive a warning if selecting an appointment slot that has already been scheduled by another Call center agent for another member. |
| [ ]  | [ ]  | RQ 31 | Call Center agent must have ability to save member data to the appointment slot that the member and call center agent have agreed upon. |
| [ ]  | [ ]  | RQ 32 | Call Center agent must receive a warning message upon saving the pending appointment if a required field is not completed. |
| [ ]  | [ ]  | RQ 33 | Solution must have the ability to schedule multiple members, up to the maximum number allowed based on business rules, in the same appointment slot for group appointments. |
| [ ]  | [ ]  | RQ 34 | Call Center agent must have ability to **enter** member information into the solution while scheduling an appointment including: name, Member ID, phone # and email address. |
| [ ]  | [ ]  | RQ 35 | Call Center agent needs ability to search/filter for all open/available appointments based on type. |
| [ ]  | [ ]  | RQ 36 | Solution must have the capability of reviewing appointment availability based on business rules in the event of an appointment change i.e. appointment is cancelled 3 days before it is scheduled, so solution should now close this slot based on 10 day business rule. |
| [ ]  | [ ]  | RQ 37 | Solution must have the ability to flag appointments for special accommodations for the member including a disability, hard of hearing, interpreter. |
| [ ]  | [ ]  | RQ 38 | Call Center agent needs ability to search/filter for all open/available appointments based on date. |
| [ ]  | [ ]  | RQ 39 | Call Center agent needs ability to search/filter for all open/available appointments based on location. |
| [ ]  | [ ]  | RQ 40 | Need ability to set the default search function to type of appointment. |
| [ ]  | [ ]  | RQ 41 | Call Center agent needs ability to search/filter for all open/available appointments based on day of the week. |
| [ ]  | [ ]  | RQ 42 | Call Center agent needs ability to search/filter for all open/available appointments based on time of day (or timeframe). |
| [ ]  | [ ]  | RQ 43 | Solution must have the ability to enter member information for walk-in/quick service appointments. |
| [ ]  | [ ]  | RQ 44 | Call Center agent must be able to save a pending appointment if any non-required field is blank. |
| [ ]  | [ ]  | RQ 45 | Call Center agent needs ability to search/filter for all open/available appointments based on disability specialists. |
| [ ]  | [ ]  | RQ 46 | Call Center agent needs ability to search/filter for all open/available appointments based on individual specialist. |
|  |  |   | **Confirmations and Reminders** |
| [ ]  | [ ]  | RQ 47 | Solution should have the capability to send confirmation letters in different languages when requested by member. |
| [ ]  | [ ]  | RQ 48 | Solution must have the capability to customize virtual/online appointments with the individualized link that the member will use to access GoToMeeting/Skype. |
| [ ]  | [ ]  | RQ 49 | Admin user(s) must receive a notification if an email confirmation notice is not delivered. |
| [ ]  | [ ]  | RQ 50 | Solution must have the capability to include the location of the appointment in the confirmation notice sent to the member including building, address and room number. |
| [ ]  | [ ]  | RQ 51 | Solution must have the capability to customize Outreach appointments with each different location of the appointment including city, building, address and room number. |
| [ ]  | [ ]  | RQ 52 | Admin user(s) must have the ability to **set up** parameters for sending appointment reminders for all appointment types including how often they are sent and the number of days prior to the appointment that they are sent. |
| [ ]  | [ ]  | RQ 53 | Admin user(s) must have the ability to **edit** parameters for sending appointment reminders for all appointment types including how often they are sent and the number of days prior to the appointment that they are sent. |
| [ ]  | [ ]  | RQ 54 | Solution must have the capability to send the confirmation notice to the member that corresponds to the type of appointment that has been scheduled. |
| [ ]  | [ ]  | RQ 55 | Solution must have the capability to customize confirmation notices for each type of appointment. |
| [ ]  | [ ]  | RQ 56 | All users must have the ability to resend the initial confirmation notice in the event of a non-delivered email. |
| [ ]  | [ ]  | RQ 57 | Solution must be able to send automatic confirmations by **email** to the member who will attend the appointment. |
| [ ]  | [ ]  | RQ 58 | Solution must have the capability to send a minimum of one reminder of the scheduled appointment prior to the appointment. |
| [ ]  | [ ]  | RQ 59 | Solution must have the capability to format confirmation notices to meet ETF's need for branding purposes. |
| [ ]  | [ ]  | RQ 60 | Solution should have an option that can be selected which prevents confirmations to the **Call Center agent** scheduling the appointment. |
| [ ]  | [ ]  | RQ 61 | Call Center agent must have the ability to **update** the members preferred method of communication to receive confirmation notices. |
| [ ]  | [ ]  | RQ 62 | Call Center agent must have the ability to **select** the members preferred method of communication to receive confirmation notices. |
| [ ]  | [ ]  | RQ 63 | Solution should have an option that can be selected which prevents confirmations to the **Member Services specialist** who will be conducting the appointment. |
| [ ]  | [ ]  | RQ 64 | Solution must be able to send automatic confirmations by **text** to the member who will attend the appointment. |
|  |  |   | **User Access and Permissions** |
| [ ]  | [ ]  | RQ 65 | Call Center agent must have access to view calendar. |
| [ ]  | [ ]  | RQ 66 | Call Center agent must have access to schedule appointments. |
| [ ]  | [ ]  | RQ 67 | Member Services specialist must have access to view calendar and/or appointments. |
| [ ]  | [ ]  | RQ 68 | Minimum of 2 users must have the ability to administer user access. |
| [ ]  | [ ]  | RQ 69 | User(s) must have the ability to view all scheduled and unscheduled appointments inside the solution for all locations and all types condensed into one calendar. |
| [ ]  | [ ]  | RQ 70 | Solution must support a minimum of 15 users with admin access available to any user designation by the department. |
| [ ]  | [ ]  | RQ 71 | Solution must support a minimum of 50 users with lower level access for viewing and scheduling appointments. |
| [ ]  | [ ]  | RQ 72 | No user should have ability to delete any existing members from the database. |
| [ ]  | [ ]  | RQ 73 | Member Services specialist must have ability to close out the appointment with some type of status including completed, cancelled or no show. |
|  |  |   | **Self Service** |
| [ ]  | [ ]  | RQ 74 | Solution should offer a mechanism for members to check in by themselves.  |
| [ ]  | [ ]  | RQ 75 | Solution must only allow one appointment to be scheduled at a time, stopping a member from scheduling multiple appointments. |
| [ ]  | [ ]  | RQ 76 | Self-scheduling would not allow members to schedule within three days of appointments (One on One, Madison Group, Virtual). |
| [ ]  | [ ]  | RQ 77 | Solution should allow admin to cancel appointment even if scheduled by member. |
| [ ]  | [ ]  | RQ 78 | Solution should allow specialists/Call center to cancel even if scheduled by member. |
| [ ]  | [ ]  | RQ 79 | Solution for self-service must have required fields of Last 4 of SSN/or MID. |
| [ ]  | [ ]  | RQ 80 | Solution for self-service must have required fields for DOB. |
| [ ]  | [ ]  | RQ 81 | Solution for self-service must have required fields first & last name. |
| [ ]  | [ ]  | RQ 82 | Solution for self-service must have required fields for phone number and type. |
| [ ]  | [ ]  | RQ 83 | Solution should allow member to select location of outreach appointments. |
| [ ]  | [ ]  | RQ 84 | Solution should allow member to reschedule but not until they have cancelled original appointment. |
| [ ]  | [ ]  | RQ 85 | System will not allow member to schedule 2 people into one appointment. |
| [ ]  | [ ]  | RQ 86 | Solution directs members to call if they need further assistance or for rush, double appts etc. |
| [ ]  | [ ]  | RQ 87 | Solution allows check boxes for special accommodations situations (i.e hard of hearing, interpreter etc). |
| [ ]  | [ ]  | RQ 88 | Solution should allow admins to turn off or on waitlist based on type of appointment. |
| [ ]  | [ ]  | RQ 89 | Wait list should maintain the order people sign up. |
| [ ]  | [ ]  | RQ 90 | Solution should NOT allow members to see who else is in that event. |
| [ ]  | [ ]  | RQ 91 | Solution must support the addition of self-service access for external members. |
| [ ]  | [ ]  | RQ 92 | Self-scheduling would not allow members to schedule with in ten days of appointments (Outreach). |
| [ ]  | [ ]  | RQ 93 | Solution for self-service must have required fields Street address. |
| [ ]  | [ ]  | RQ 94 | Solution for self-service must have required fields for email |
| [ ]  | [ ]  | RQ 95 | External members must have access to view available appointments. |
| [ ]  | [ ]  | RQ 96 | The solution must have rules to prevent members who don't qualify for an appointment from scheduling (IE: No retirement estimate, Not old enough). |
| [ ]  | [ ]  | RQ 97 | External members must have access to schedule appointments for themselves for all appointment types. |
| [ ]  | [ ]  | RQ 98 | Solution should allow the member to cancel and reschedule before the deadline of the appointment (ie: 3 days, 10 days). |
| [ ]  | [ ]  | RQ 99 | System must authenticate member data if mis-spelled or system unable to locate creating an error |
| [ ]  | [ ]  | RQ 100 | Solution should be able to maintain a wait list for events. |
| [ ]  | [ ]  | RQ 101 | Solution has link for easy cancelling available in email or text. |
| [ ]  | [ ]  | RQ 102 | Solution needs to identify when/if there is a need for a disability benefit and only allow them to schedule with select people. |
| [ ]  | [ ]  | RQ 103 | If no retirement estimate, solution should point member to retirement request. |
| [ ]  | [ ]  | RQ 104 | System must authenticate member by using SSN or MID and DOB. |
| [ ]  | [ ]  | RQ 105 | Solution should allow member to filter/search based on type of appointment. |
| [ ]  | [ ]  | RQ 106 | Solution should send the appointment confirmation when removed from the waitlist.  |
| [ ]  | [ ]  | RQ 107 | Solution needs to be able to determine if there is a recent retirement estimate (Within 12 months of today's date). |
| [ ]  | [ ]  | RQ 108 | Solution should maintain a history of wait listed people even after event date. |
| [ ]  | [ ]  | RQ 109 | Solution should automatically fill open slot w/waitlist. |
| [ ]  | [ ]  | RQ 110 | Solution should hold the open spot for the wait listed people until confirmed or by a certain time and then move to next person. |
| [ ]  | [ ]  | RQ 111 | Solution allows comments from the member scheduling. |
| [ ]  | [ ]  | RQ 112 | Solution should allow members to see schedule in an easy to see schedule/ master Calendar. |
| [ ]  | [ ]  | RQ 113 | Solution should allow member to filter/search based on date of appointment. |
| [ ]  | [ ]  | RQ 114 | Solution should allow member to filter/search based on location of appointment. |
| [ ]  | [ ]  | RQ 115 | Solution should link to account to record they have an appointment, CALLSS/WEBS. |
| [ ]  | [ ]  | RQ 116 | Scheduling tool should have ability to link to descriptions of types of appointments to aid in member selecting type. |
| [ ]  | [ ]  | RQ 117 | Solution should allow member to filter/search based on day of week. |
| [ ]  | [ ]  | RQ 118 | Solution allows member to filter/search based on time. |
| [ ]  | [ ]  | RQ 119 | Solution should be able to have multiple types of appointments with varied time allowances if member wants to schedule an appointment for other topics besides retirement. |
|  |  |   | **Reporting and Analytics and Tracking** |
| [ ]  | [ ]  | RQ 120 | Solution should have the capability of tracking edits done to any appointment including user who made the change, time and date of the change and detail of what was changed. |
| [ ]  | [ ]  | RQ 121 | Solution should have the capability of tracking who enters the original appointment. |
| [ ]  | [ ]  | RQ 122 | Solution should have the capability to customize reports for ad-hoc purposes. |
| [ ]  | [ ]  | RQ 123 | Solution should have the capability of producing reports in various formats including excel, csv, PDF. |
| [ ]  | [ ]  | RQ 124 | Solution should have the capability of reporting on appointment history including reschedules, cancellations and no shows. |
| [ ]  | [ ]  | RQ 125 | Solution should have the capability to produce on demand real time reports. |
| [ ]  | [ ]  | RQ 126 | Solution should have the capability of reusing reports that are used often. |
|  |  |   | **Employer Training Only**  |
| [ ]  | [ ]  | RQ 127 | Required Employer number or employer name. |
| [ ]  | [ ]  | RQ 128 | Solution for self-service must have required fields for employer number. |
| [ ]  | [ ]  | RQ 129 | Admin user(s) must be able to cap attendance per training session. |
| [ ]  | [ ]  | RQ 130 | Solution should be able to provide an excel spreadsheet of attendees to print. |
| [ ]  | [ ]  | RQ 131 | Solution should allow employers to see all the dates/locations of training session and choose the session they want to attend. |
| [ ]  | [ ]  | RQ 132 | Solution should have ability to send custom email to employers about registration info and after training info.  |
| [ ]  | [ ]  | RQ 133 | Solution should have the ability to send employer specific information regarding training needs immediately after registration confirmation. |
| [ ]  | [ ]  | RQ 134 | In emergency situations, in case of need for cancellation, solution should have ability to send a message to all registrants with some sort of receipt verification to ETF. |
|  |  |   | **Human Resources** |
| [ ]  | [ ]  | RQ 135 | Admin user(s) need the ability to make an open/available appointment slot unavailable if interview panel becomes unavailable as an exception to the template (refer to RQ3). |
| [ ]  | [ ]  | RQ 136 | All references to members need to be changed to applicants |
| [ ]  | [ ]  | RQ 137 | Admin user(s) need the ability to edit the interview schedule availability for a specific position through the solution on an exception basis (see RQ12). |
| [ ]  | [ ]  | RQ 138 | Solution must have the ability for applicant to flag interview appointments for special accommodations including a disability, hard of hearing, interpreter (see RQ37). |
| [ ]  | [ ]  | RQ 139 | Admin user(s) must have ability to **edit** applicant information already stored in the solution while scheduling an appointment including: name, phone # and email address (does not include member ID - see RQ26). |
| [ ]  | [ ]  | RQ 140 | Two people should not be allowed to schedule two or more applicants to the same interview time slot (see RQ29). |
| [ ]  | [ ]  | RQ 141 | Solution needs to have the ability to merge existing applicant accounts (when the same applicant has 2 or more different accounts). |
| [ ]  | [ ]  | RQ 142 | Self-scheduling would not allow applicants to schedule within 24 hours of the day of the interviews. (see RQ76) |
| [ ]  | [ ]  | RQ 143 | Solution for self-service must have required fields for email (see RQ82). |
| [ ]  | [ ]  | RQ 144 | The solution must have rules to prevent applicants from scheduling an interview for a position they're not invited to. (see RQ96) |
| [ ]  | [ ]  | RQ 145 | Solution should have ability to send custom email to applicant after interview is complete. |
| [ ]  | [ ]  | RQ 146 | In emergency situations, in case of need for interview cancelation, Solution should have ability to send a message to all applicants and be able to send the admin user(s) a confirmation that applicants have received the cancellation notice. |
| [ ]  | [ ]  | RQ 147 | Admin needs ability to search/filter for all open/available interview times based on type of interview (exercise vs. phone/in-person interview - see RQ35). |
| [ ]  | [ ]  | RQ 148 | All references to appointment need to be changed to interview. |
| [ ]  | [ ]  | RQ 149 | Solution needs to have the ability to create different schedules for every recruitment/position. |
| [ ]  | [ ]  | RQ 150 | Admin user(s) or applicant must be able to save a pending interview time if any non-required field is blank (see RQ44). |
| [ ]  | [ ]  | RQ 151 | Solution should send confirmations to the **admin user(s) after** scheduling the interview. |
| [ ]  | [ ]  | RQ 152 | Any reference to Call Center Agent should be changed to admin user(s) or HR. |
|  |  |   | **Technical Requirements**  |
|  |  |   | **Interoperability** |
| [ ]  | [ ]  | RQ 153 | Must fully support the latest releases of leading desktop browsers, including: Chrome, Firefox, IE, Edge, Safari. |
| [ ]  | [ ]  | RQ 154 | Solution must integrate with O365 without additional development work (backend, ETF-side).  |
| [ ]  | [ ]  | RQ 155 | Must be compatible with Windows 10 OS. |
| [ ]  | [ ]  | RQ 156 | Must provide APIs to allow for interfacing with ETF back-end-systems (e.g. CRM). |
| [ ]  | [ ]  | RQ 157 | Appointment confirmation/entry into member calendar needs to be compatible with standard email formats (member side). |
| [ ]  | [ ]  | RQ 158 | Any add-ins must be deployable using Microsoft System Center Configuration Manager (SCCM). |
|  |  |   | **Tech Security** |
| [ ]  | [ ]  | RQ 159 | Must support ADFS/SAML for user authentication and account management. |
| [ ]  | [ ]  | RQ 160 | Must use a roles-based security model to facilitate the principal of least-privilege. |
| [ ]  | [ ]  | RQ 161 | Data encryption must be used while in transit and at rest (minimum 256 bit). |
| [ ]  | [ ]  | RQ 162 | Solution must allow unauthenticated and authenticated appointment scheduling. |
|  |  |   | **Availability** |
| [ ]  | [ ]  | RQ 163 | Must maintain a minimum uptime of 99.9% annually outside of normal maintenance window activity (vendor-defined).  |
|  |  |   | **Privacy** |
| [ ]  | [ ]  | RQ 164 | If multi-tenant design: Must provide adequate logical isolation to ensure ETF's data is only accessible by ETF staff. |
|  |  |   | **Performance** |
| [ ]  | [ ]  | RQ 165 | Solution has to scale to ensure that there is no loss of performance during peak usage times (e.g. click-through response not to exceed 4 seconds). |
|  |  |   | **Non-functional / Technical** |
| [ ]  | [ ]  | RQ 166 | Must allow member to choose method of appointment confirmation (email vs text, vs phone) during self-scheduling. |
| [ ]  | [ ]  | RQ 167 | System must require member (self-scheduled appointment) to confirm appointment via preferred confirmation method selected during self-scheduling (email, text; e.g. enter code or click on link in email, respond to call).  |
| [ ]  | [ ]  | RQ 168 | Need workflow to drive down to what type of appointment is needed and based on that present the available times. (System has enough information gathered from member responses to send member to right type of appointment.) |
| [ ]  | [ ]  | RQ 169 | Ability to make web API calls and to use that information to drive the workflow (look up and validate member-entered information). |
| [ ]  | [ ]  | RQ 170 | Solution must be section 508 compliant. |
| [ ]  | [ ]  | RQ 171 | Solution must be able to integrate into third party solutions (e.g. CRMs such as SalesForce). |
| [ ]  | [ ]  | RQ 172 | Solution must have responsive design so application will automatically size to PCs, phones, tablets, etc. |
|  |  |   | **Data Governance** |
| [ ]  | [ ]  | RQ 173 | ETF maintains ownership of ETF data. |
| [ ]  | [ ]  | RQ 174 | Vendor must have well-documented recovery process in the event of termination of subscription / relationship. |
| [ ]  | [ ]  | RQ 175 | ETF's data must reside in the continental United States only. |
| [ ]  | [ ]  | RQ 176 | ETF has ability to export data to ETF network for records retention as deemed necessary by ETF |
|  |  |  | **DATA SECURITY REQUIREMENTSVendor shall provide evidence they can protect the privacy and security of Confidential Information according to applicable laws and regulations:** |
|  |  |   | **AUDIT:** |
| [ ]  | [ ]  | RQ 177 | SOC2 Type II or similarly recognized audit completed within eighteen months prior to date of vendor evaluation. |
|  |  |   | **Privacy:** |
| [ ]  | [ ]  | RQ 179 | Compliance with the HIPAA Privacy Rule. Specifically: Subpart C of 45 CFR Part 164  Protected Health Information under HIPAA, 45 CFR 160.103 |
| [ ]  | [ ]  | RQ 180 | Comply with Federal Information Processing Standards (FIPS) Publication 140-2 |
|  |  |   | **Vendor Support** |
| [ ]  | [ ]  | RQ 181 | Vendor provides easily accessible and responsive technical support.  |
| [ ]  | [ ]  | RQ 182 | Vendor offers problem resolution w/o required upgrade (i.e., model includes patch sets). |
| [ ]  | [ ]  | RQ 183 | Support encompasses >= 3 major vers. of software. |
|  |  |   | **Product Support** |
| [ ]  | [ ]  | RQ 189 | Vendor offers train the trainer education either onsite or remote. |
| [ ]  | [ ]  | RQ 190 | Vendor offers online tools that could be used for training. |
| [ ]  | [ ]  | RQ 191 | Vendor offers dedicated account manager for questions and issues. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Agree** | **Disagree** | **#** | **Additional Mandatory Requirements** |
| [ ]  | [ ]  |  | The Bidder agrees to perform the tasks described in the RFB in the timeframe specified in Project Timeline. |
| [ ]  | [ ]  |  | The Bidder shall adhere to all ETF terms and conditions, policies and procedures. Any exceptions to this statement must be cleared, in writing, by ETF. |
| [ ]  | [ ]  |  | The Bidder has no conflict of interest with regard to any other work performed for the State of Wisconsin. Bidder shall notify ETF if, during the term of the Contract, such a conflict arises.  |
| [ ]  | [ ]  |  | The Bidder adhered to the instructions in the RFB for preparing and submitting a Bid. |
| [ ]  | [ ]  |  | The Bidder has not been suspended or debarred from performing government work. Bidder shall notify ETF if, during the term of the Contract, such a suspension or debarment occurs. |
| [ ]  | [ ]  |  | During the past five years, the Bidder has not been involved with any litigation alleging breach of contract, fraud, breach of fiduciary duty or other willful or negligent misconduct. The Bidder has not been in bankruptcy and/or receivership with the last five years.  |
| [ ]  | [ ]  |  | The Bidder has two or more years of experience providing appointment scheduling software. The clients listed on Form D validate such experience. Note: Although the Bidder’s listed references will serve as the primary references for purposes of this RFB, ETF specifically reserves the right to contact **any** of Bidder’s or Subcontractors’ current or past clients for information about the Bidder’s/Subcontractors’ performance under past and present contracts. |
| **ACKNOWLEDGE AND ACCEPT** |
| This Form has been reviewed by me and shall become part of the final Contract. I am a duly authorized representative of my company and have the authority to legally bind my company. I hereby acknowledge and accept responsibility for the accuracy of the responses given above. I further accept that my company’s Bid *may* be rejected on the grounds that any mandatory item listed above is marked as “Disagree.” Also, I acknowledge I have specified and provided a reason for any answer marked as “Disagree” in TAB 2 Assumptions and Exceptions of my company’s Bid. |
|  |  |
| Bidder (Company) Name: |       |
|  |  |  |
|       |  |  |
| Printed Name of Authorized Bidder (Company) Representative |  |  |
|  |  |       |
| Signature of Authorized Bidder (Company) Representative |  | Date |