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| --- | --- | --- | --- |
|   |  **State of South Carolina** **South Carolina Public Employee Benefit Authority****Request For Qualifications** | Solicitation Number: Date Issued: Procurement Officer: Phone: E-Mail Address: | PEBA0202018RFQ3/14/2018 David H. Quiat, CPPB803.734.0602dquiat@peba.sc.gov |

|  |
| --- |
| DESCRIPTION: **Request for Qualifications to Provide a New Benefits Administration System.**  |

 SUBMIT QUALIFICATIONS BY (Date/Time):   **4/30/2018 4:00 PM**

 SUBMIT YOUR QUALIFICATIONS TO EITHER OF THE FOLLOWING ADDRESSES:

|  |  |
| --- | --- |
| MAILING ADDRESS:South Carolina Public Employee Benefit AuthorityP.O. Box 11960Columbia, S.C. 29211-1960Attention: David H. Quiat  | PHYSICAL ADDRESS:South Carolina Public Employee Benefit Authority202 Arbor Lake DriveColumbia, S.C. 29223Attention: David H. Quiat  |

|  |
| --- |
|  COMPANY NAME   (Full legal name of business) |
|  AUTHORIZED SIGNATURE   |
|  TITLE  (Business title of person signing above) |
|  PRINTED NAME  (Printed name of person signing above) |  DATE  |
| MAILING ADDRESS |
| CITY | STATE/ZIP CODE  |
| TELEPHONE # | E-MAIL ADDRESS |

SAP

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REQUEST FOR QUALIFICATIONS

PEBA0202018RFQ

REQUEST FOR QUALIFICATIONS TO PROVIDE A NEW BENEFITS ADMINISTRATION SYSTEM

**SCHEDULE OF KEY DATES**

**All dates subject to change**

|  |  |
| --- | --- |
| Distribution of the Request for Qualifications | 3/14/2018 |
| Deadline for Submission of Questions (4:00 p.m.)  | 4/5/2018 |
| State’s Written Responses to Questions (tentative) | 4/16/2018 |
| Deadline for Submittal of Qualifications (4:00 p.m.)  | 4/30/2018 |
| Short-Listing Notification/Posting (tentative) | 5/15/2018 |
| Distribution of Draft RFP to Short-Listed Vendors for Review (tentative) | 6/1/2018 |
| Distribution of Final RFP (tentative)  | 9/1/2018 |

**PART 1**

**GENERAL INSTRUCTIONS**

* 1. **AMENDMENTS TO THE REQUEST FOR QUALIFICATIONS**: (a) The Request for Qualifications may be amended at any time prior to opening. All amendments to this Request for Qualifications shall be in writing from the State. The State shall not be legally bound by any amendment which is not in writing. Prospective offerors should monitor the following web site for the issuance of amendments: <https://procurement.sc.gov/vendor/contract-opps/other-solicitations/peba> (b) Prospective offerors shall acknowledge receipt of any amendment to this Request for Qualifications (1) by signing and returning the amendment, (2) by acknowledging receipt in the prospective offerors’ response, or (3) by submitting a response that indicates in some way that the prospective offeror received the amendment.

**1.2 QUESTIONS FROM PROSPECTIVE OFFERORS**: (a) Any prospective offeror desiring an explanation or interpretation of the Request for Qualifications must request it in writing. Oral explanations or instructions will not be binding. Any information given a prospective offeror concerning the Request for Qualifications will be furnished promptly to all other prospective offerors as an Amendment to the Request for Qualifications, if that information is necessary for submitting a response or if the lack of it would be prejudicial to other prospective offerors. We will not identify you in our response to your question. (b) The State seeks to permit maximum practicable competition. Prospective offerors are urged to advise the Procurement Officer as soon as possible regarding any aspect of this procurement, including any aspect of the Request for Qualifications that unnecessarily or inappropriately limits full and open competition. Prospective offerors should advise the South Carolina Public Employee Benefit Authority of any problems they perceive as a result of reviewing this Request for Qualifications document.

**1.3 SUBMISSION OF QUESTIONS:** Any questions, comments, requests for information or clarifications regarding the Request for Qualifications must be submitted in writing and received no later than **4:00 PM local time, April 5, 2018**. After this date, no further questions, comments, request for information or clarifications regarding the Request for Qualifications will be addressed.

Any written questions, requests for information or request for clarifications received, will be responded to in the form of a written amendment to the Request for Qualifications and e-mailed to all prospective offerors. The amendment will also be posted at the following web address: <https://procurement.sc.gov/vendor/contract-opps/other-solicitations/peba>

All questions, comments, requests for information or clarifications regarding the Request for Qualifications should be submitted as indicated below. All questions, comments, requests for information or clarifications should, to the highest degree possible, cite the specific Request for Qualifications section and paragraph number(s) to which the question refers. All questions, comments, requests for information or clarifications regarding this Request for Qualifications should include the identity of the sender, firm name, mailing address, telephone number, and e-mail address. Email is the preferred method for submitting questions with “Questions: Request for Qualifications PEBA0202018RFQ” as the subject of the email. Submit questions in an easily copied format such as MS Word using the format specified below:

SEND QUESTIONS TO:

MAIL TO: HAND DELIVER/EXPRESS

South Carolina Public Employee Benefit Authority South Carolina Public Employee Benefit Authority

PO Box 11960 202 Arbor Lake Drive

Columbia, SC 29211-1960 Columbia, SC 29223

Attention David H. Quiat, CPPB Attention David H. Quiat, CPPB

**E-MAIL ADDRESS:**

dquiat@peba.sc.gov

* 1. **REJECTION/CANCELLATION**: PEBA reserves the right to accept or reject any and all responses and/or discontinue the selection process at any time prior to contract execution.
	2. **SUBMITTING YOUR RESPONSE**: (a) All copies of your response, and any other documents required to be submitted with the response should be enclosed in a sealed, opaque envelope or package – (1) Addressed to the office specified on the Cover Page; and (2) Showing the time and date specified for opening, the Request for Qualifications number, and the name and address of the prospective offeror. (b) Prospective offerors using commercial carrier services shall ensure that the response is addressed and marked on the outermost envelope or wrapper as prescribed in paragraphs (a)(1) and (2) when delivered to the office specified on the Cover Page. (e) Facsimile or e-mail responses will not be considered.

**1.6 SUBMITTING CONFIDENTIAL INFORMATION**: For every document prospective offeror submits in response to or with regard to this Request for Qualifications, prospective offeror must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that prospective offeror contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a)(1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410. For every document prospective offeror submits in response to or with regard to this Request for Qualifications, prospective offeror must separately mark with the words "TRADE SECRET" every page, or portion thereof, that prospective offeror contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act. For every document prospective offerors submit in response to or with regard to this Request for Qualifications, prospective offerors must separately mark with the word "PROTECTED" every page, or portion thereof, that prospective offeror contends is protected by Section 11-35-1810. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Do not mark your entire response as confidential, trade secret, or protected. In determining whether to release documents, the State will detrimentally rely on prospective offerors’ marking of documents, as required by these instructions, as being either "CONFIDENTIAL" or "TRADE SECRET" or "PROTECTED". By submitting a response, prospective offeror agrees to defend, indemnify and hold harmless the State of South Carolina, its agencies, officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from withholding information by the State of South Carolina or any of its agencies, that prospective offeror marked as "CONFIDENTIAL" or "TRADE SECRET" or "PROTECTED". (All references to S.C. Code of Laws.)

**1.7 DEADLINE FOR SUBMISSION OF YOUR RESPONSE:** The South Carolina Public Employee Benefit Authority will receive responses until 4:00 p.m. local time on the opening date shown. It is the prospective offerors' sole responsibility to ensure the South Carolina Public Employee Benefit Authority receives their response. Prospective offerors mailing responses should allow a sufficient mail delivery period to ensure timely receipt of their response by the South Carolina Public Employee Benefit Authority. Any response received after the date/time set for submittal shall be rejected.

**1.8 DEBRIEFING MEETINGS**: If a prospective offeror not short-listed would like to schedule a debriefing, prospective offeror will have five (5) business days from the date the short-listing notification is issued/posted. Only written requests (emails are acceptable) for a debriefing will be scheduled. Failure to request a debriefing within the five (5) business day period waives the opportunity for a debriefing. Prospective offerors may request return of their responses within thirty (30) calendar days after the date of short-list notification/posting. All cost of returns will be paid by the prospective offeror. Thirty (30) calendar days after the short-list notification/posting all materials submitted by prospective offerors not short-listed may be destroyed.

**PART 2**

**INTRODUCTION**

The South Carolina Public Employee Benefit Authority (PEBA) was created July 1, 2012 by the South Carolina General Assembly as part of the retirement reform legislation, Act No. 278. PEBA is the state agency responsible for the administration and management of the State’s employee insurance programs and retirement systems.

PEBA’s governing body is an eleven (11) member board of directors. PEBA functions must be performed, exercised, and discharged under the supervision and direction of the board of directors.

PEBA contains the following major departments:

1. Administration
2. Legal
3. Retirement Financial Services (accounting)
4. Retirement Payment Management
5. Retirement Service Purchase
6. Retirement Customer Claims
7. Retirement Imaging
8. Insurance Finance and Accounting
9. Insurance Enrollment processing, Imaging, and Quality Assurance
10. Insurance Research and Statistics, Wellness Initiatives, and HIPAA Compliance
11. Combined Customer Intake and Call Center
12. Employer Services
13. Defined Contribution Unit
14. Information Technology

## PEBA Retirement Benefits

PEBA Retirement Benefits administers five (5) defined benefit plans, which are the South Carolina Retirement System (SCRS), the Police Officers Retirement System (PORS), the General Assembly Retirement System (GARS), the Judges and Solicitors Retirement System (JSRS), and the South Carolina National Guard Supplemental Retirement Plan (SCNG). PEBA and outside vendors administer the State Optional Retirement Program (ORP) which is a defined contribution plan, offered as an alternative to the mandatory defined benefit plans. Collectively, these plans in total support approximately 239,000 active members, 157,000 annuitants, and 194,000 inactive members.

The Deferred Compensation program is a defined contribution supplement to other retirement benefits through before-tax and after-tax contributions in 401(k) and/or 457 plans, with approximately 100,000 total active contributing and non-contributing participants.

With few exceptions, participation in one of the defined benefit plans or the ORP plan is mandatory for employees at any of the 850 participating public entities. Deferred Compensation Program participation is voluntary and optional. All Deferred Compensation Participants participate in either a defined benefit plan or ORP.

PEBA Retirement Benefits processes, calculates, and disburses benefits including service retirement, disability retirement, refunds of contributions, and various death benefits. Active members may also purchase service credit and have the option to finance the purchase in-house via our installment program.

Total disbursements of all retirement-related benefits for the defined benefit programs were nearly $3.3 billion for fiscal year 2017.

Retirement Benefits is also responsible for collecting retirement contributions from approximately 1,000 participating employers. Contributions are held in trust and used to pay claims and administrative expenses. For all plans except the SCNG, both the employers and employees contribute toward retirement.

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## PEBA Insurance Benefits

PEBA Insurance Benefits provides insurance benefits to more than 490,000 lives, comprised of 190,000 active employee subscribers, 85,000 retirees, and the dependents of both. Participants are employees and retirees from more than 690 participating employers, comprised largely (though not entirely) from the 850 groups participating in the Retirement Benefits program described earlier.

Insurance Benefits offers a wide range of self-insured and fully-insured products. The self-insured products include a group health plan, a group dental plan, and a basic long term disability plan. The fully-insured products include a group vision plan, multiple life insurance products, a supplemental dental product, and supplemental long-term disability plan. Insurance Benefits also offers tax-favored medical and dependent spending accounts.

Insurance Benefits houses eligibility and enrollment data for all participating employers and all benefit plans. PEBA Insurance Benefits processes all enrollment requests for newly-hired employees, as well as newly-eligible retirees, survivors, and COBRA subscribers. Additionally, Insurance Benefits processes enrollment changes throughout the year and holds an annual enrollment period each October.

Insurance Benefits is responsible for billing employers for both the employer and employee contribution to premiums for active employees, and a limited subset of retired, survivor, and COBRA subscribers. It bills most individual subscribers, including the majority of retiree, survivor, and COBRA subscribers, for premiums from all benefit elections. Certain retirees receive a contribution to premiums from a state trust fund for that purpose, which Insurance Benefits also oversees and processes.

Premiums collected for self-insured products are held in trust and used to pay claims and administrative expenses. For these programs, Insurance Benefits contracts for Third Party Administration, meaning that Third Party Claims Administrators process the claims but do so with the State of South Carolina’s adopted rules and funds from the above-mentioned trusts. Both the employers and employees contribute toward the premiums for these self-insured products for active employees. Funding premiums for retirees, survivors, and COBRA subscribers vary.

The premiums for the remaining fully-insured products are paid by employees only. Premiums for the other fully-insured products are remitted to Insurance Benefits, which pays them to the third-party administrators. Generally, the fully insured products operate under certificates or plan documents subject to the vendors’ rules, at times with input from PEBA Insurance Benefits.

**PEBA Operational Information Technology Systems**

The Operational Information Technology Systems include subsystems for all major business functions. The systems are hosted at the PEBA facility in Columbia, South Carolina on a combination of UNIX, Linux, and Windows servers.

Retirement Systems

The PEBA Retirement division utilizes a number of applications to support its current operation. Core retirement functionality exists in the Retirement/UNIX legacy application. The application is built using Natural Programming language with data stored in an ADABAS database. This application supports a full range of defined benefit plan functions, including member accounts and service posting, employer reporting, retirement claims, annuity and one-time payments, and the receipt and accounting of retirement financial transactions. The Retirement/UNIX application interfaces with 29 incoming external data interfaces and 86 outgoing external data interfaces. The system creates over 654 reports and processes 170 different forms and letters.

The system has a modular code base that provides the ability for other applications to use Retirement/UNIX common system functions and data access. The leveraging of Retirement/UNIX functions is done through brokered calls to the UNIX system and ADABAS database initiated by other Retirement applications. Generally, employer and active member processes are supported through the original green screen legacy system, whereas the claims, benefit payroll and payment/payee maintenance functions are supported through the CRIS system. The CRIS system has its own unique functionality, but uses brokered calls to access the Retirement/UNIX application’s automated functions. The CRIS system is used exclusively by internal PEBA users.

In addition to CRIS, two GUI applications leverage the core Retirement/UNIX code base. The EES system is a GUI interface system that supports employer business functions. The Member Access system is the GUI interface system that supports member and retiree information processing and data access. Both of these applications use the same approach as CRIS, which is to leverage Retirement/UNIX functions where possible while presenting a more modern GUI system interface to application users.

The Team IA system supports imaging and workflow functions for both the Retirement/UNIX and CRIS applications. A full range of scanning, indexing, workflow queue management, document search and other EDMS extended functions are used by the Retirement division. There is also custom coded workflow and work tracking functionality in the Retirement/UNIX system (the function generates WIPs – work in process notices) and is used extensively throughout the system.

Lastly, detailed retirement financial transactions are stored in the Retirement/UNIX database. Retirement financial transactions are summarized and interfaced to the SAP general ledger and financial reporting system on a daily basis. The financial management of investment accounting transactions and coordination with PEBA’s custodial bank is also supported through the SAP system. Of note, the Insurance division integrates with the State SAP financial system and not the SAP system operated by PEBA.

The PEBA SAP application interfaces with 14 incoming external data interfaces.

The table below provides a brief description of each of the major Retirement division applications. The applications are described in more detail in subsequent sections.

| Key Applications | Purpose | In Scope of the RFP? | Size |
| --- | --- | --- | --- |
| Retirement/UNIX | Retirement is the legacy Natural language based application that supports a full range of PEBA defined benefit plan functionality. Some of the system’s functionality is presented via a character-based, green screen interface, while other functions are presented via separate GUI applications (CRIS, EES, and Member Access). System contains approximately thirty (30) years of transactional data. | Yes | 139GB of data179 Files (Tables)271 Million records |
| Comprehensive Retirement Intranet System (CRIS) | A GUI based system that provides core functionality to PEBA internal users supporting claims processing and benefit payment functions.  | Yes | Not an operational data store |
| Member Access | This GUI application provides self-service functionality for active members and retirees. Active members can submit retirement applications, perform benefit estimates, submit requests the purchase of service, change demographic information, and view member account statements. Retirees can access beneficiary information and 1099R tax forms, while having the ability to update tax withholdings and direct deposit information.  | Yes | Not an operational data store |
| Electronic Employer Services (EES) | A web based, self-service GUI application that supports employer functions including member enrollments and employer deposits and reporting. Employers can also track outstanding PEBA requests that need to be fulfilled via this application.  | Yes | Not an operational data store |
| SAP Accounting | SAP ECC 6.0 is the financial system used to support general ledger and financial reporting for PEBA retirement and investment accounting business areas. | No | N/A |
| Electronic Document Management System (EDMS)  | This application from Team IA is used to scan, index, image and store documents (forms, letter, reports, etc.). The system also manages certain retirement workflow processes. For the Retirement division, most high volume source documents are imaged upfront and PEBA staff process the imagined documents using pre-defined workflows. Other Team IA document management and correspondence generation utilities are utilized by the division.System contains approximately twenty (20) years of transactional data. | Yes | 65 million images |

Retirement/UNIX and CRIS

The Retirement/UNIX application hosts the majority of retirement business functions and data. There are several Java applications that have been built to provide a more modern GUI interface to the core ADABAS system. The GUI application that supports benefit payment and claim functions is called the CRIS system.

The Retirement/UNIX system was internally developed in 1989 using the Natural programming language. The system includes over 15,000 programs and utilizes 178 database files. CRIS was added in September of 2009.

Retirement/UNIX and CRIS Key Functions

The Retirement/UNIX and CRIS applications perform the following key functions:

| No | Key Functions  | Accessed Internally Via |
| --- | --- | --- |
| 1 | Customer Service Call Log | UNIX – Green Screen |
| 2 | Service Accounting and Cash Receipts | UNIX – Green Screen |
| 3 | Employer Maintenance | UNIX – Green Screen |
| 4 | Employer Reporting  | UNIX – Green Screen |
| 5 | Member Contributions and Service | UNIX – Green Screen |
| 6 | Average Final Compensation | UNIX – Green Screen |
| 6 | Service Purchase | UNIX – Green Screen |
| 7 | Claims  | CRIS |
| 8 | Benefit Payments Payrolls  | CRIS |
| 9 | Retiree and Payee Maintenance | CRIS |
| 10 | Benefit Adjustments and Cyclical Processing | CRIS |

Retirement/UNIX and CRIS Application Database

The Retirement/UNIX application uses an ADABAS database. Following are some of the key files within the Retirement/UNIX ADABAS database:

* Account Master
* Service File
* Installment Notes
* Member Transaction File
* Transaction History File
* Beneficiary File
* Client
* Client Address
* EES and Member Access Security Information
* Sub Ledger Accounting Transactions
* Claims Applications
* Retirement Accounts
* Payee Accounts
* Payment Transactions
* 1099 Records
* Tables

The key current file structures supporting member accounts are designed around the account master, service file, and member transaction files. The service file contains contribution, interest and other account transactions. The Account Master is a file containing summarized member information from the service file and is created each year for members during the previous year-end closing process. The member transaction file is a historical view of all detailed transactions used for audit trail purposes.

The sub ledger files are used to store detailed accounting data that will eventually be “rolled up” and interfaced into the SAP accounting system. The sub ledger files are updated through transactions created in multiple departments across PEBA. Service purchase transactions, cash receipt deposits, employer contribution postings, and payment transactions are all created daily in their respective departments. A nightly program reads all the individual files and rolls up the transactions into the general ledger.

Member Access

Member Access is a java web-based application that allows members, both active/inactive and retired, the ability to view/maintain certain retirement information. All members may update their address and contact information, i.e. email address and phone number. Active/inactive members may view account information and beneficiaries. Member Access has over 94,000 users.

Member Access Key Functions

The member access application performs the following key functions:

| No | Key Functions  |
| --- | --- |
| 1 | Create and maintain user accounts.  |
| 2 | Update contact information. |
| 3 | Active/Inactive members can view account information and beneficiaries. |
| 4 | Active/Inactive members can print member statements.  |
| 5 | Active/inactive members can submit a service retirement application. |
| 6 | Active members may submit a service purchase request. |
| 7 | Active/inactive members can do a service purchase cost estimate. |
| 8 | Active State ORP members can view vendor information. |
| 9 | During State ORP open enrollment, State ORP members can change vendors. |
| 10 | State ORP members receive messages about changing vendors or switching to SCRS, if eligible, during open enrollment. |
| 11 | Retirees may view retirement account information including beneficiaries. |
| 12 | Annuitants can view payment transactions and print annuity verification letters. |
| 13 | Refund payees can view payment transactions. |
| 14 | All payees may view and print 1099 data. |
| 15 | Annuitants can manage tax withholding categories and EFT information. |
| 16 | TERI participants can print TERI statements. |

Note: TERI is PEBA’s DROP program.

EES

The EES system is an employer access system that is separate from the EBS insurance employer access system. EES is used to support employer retirement functions. This application was initially developed in 1998.

EES Key Functions

The EES application can perform following key functions:

| No. | Key Functions  |
| --- | --- |
| 1 | Provides the ability to view key retirement information for their active employees. |
| 2 | Provides ability to compute basic retirement estimates to employees.  |
| 3 | Allows PEBA to send forms for completion through tasks, which PEBA initiates and places on their task list. This eliminates paper and postage costs. |
| 4 | Provides the ability to upload quarterly reporting information and view reporting errors. |
| 5 | Provides the ability to enroll new employees and to enter return to work information for newly employed retirees. |
| 6 | Provides ability to download limited data from PEBA files. |
| 7 | Provides the ability to remit installment accounting service purchase payments. |
| 8 | Allows the ability to maintain employer contact and user information. |
| 9 | Provides the ability for employers to upload furlough supplemental information electronically. |

SAP Accounting

***This application is not in scope of this project. This information is provided for informational purposes only.***

The PEBA SAP accounting system is a third-party COTS integrated system that supports enterprise resource planning (ERP). Although there are many modules with the SAP ERP suite of products and modules, PEBA uses only the accounting module. The system, as configured for PEBA, supports three functions within the Retirement division. These functions include:

* Managing and summarizing retirement financial information, the chart of accounts, and overall accounting and reporting for employer, member, and benefit recipient transactions.
* Managing investment accounting financial transactions provided by the custodial bank, allocating quarterly performance across PEBA Retirement plans, and adjusting investment data as necessary.
* Providing financial statements that conform to GASB and CAFR accounting and reporting requirements.

PEBA has version ECC 6.0 of the SAP system. The PEBA implementation uses an Oracle relational database for data management and the SAP provided GUI (GuiXT version 7.10) to access the SAP environment. PEBA has a license for 2 developers and 10 users.

Specialized external SAP resources are required to support this application. A contractor is on retainer with PEBA to support system enhancements and data interface updates.

The SAP accounting module was procured in early 2000’s. The deployment of retirement and investment accounting functions were made at the same time.

SAP Accounting Key Functions

The member access application can perform the following key functions:

| No | Key Functions  |
| --- | --- |
| 1 | Accepts monthly general ledger investment transactions from the custodial bank. |
| 2 | Accepts daily general ledger retirement transactions from the Retirement/UNIX system. |
| 3 | Allocates investment revenue/expenses (monthly) and assets/liabilities (annually) to PEBA plans. |
| 4 | Creates monthly and annual financial statements. |
| 5 | Generates audit and management reports. |

## Retirement System

### As-Is Data Flow Diagram



Note: Above diagram as of June 2016

**Insurance Systems**

The PEBA Insurance division utilizes a number of applications to support its current operations. Of these, there are two core applications: Insurance/UNIX and Premium Billing & Insurance Accounting.

The Insurance/UNIX application is legacy Natural language, green screen, character-based system that supports the majority of all PEBA insurance business activities. Insurance/UNIX maintains subscriber eligibility and enrollment data for all participating employers as well as calculating premiums for all insurance benefit coverages. This application processes paper form submissions or web automated (using accompanying PEBA browser applications) for all enrollment requests and newly-hired employees, as well as newly-eligible retirees, survivors, and COBRA subscribers. The application also manages enrollment and premium changes for current subscribers throughout the year and during the annual open enrollment period. The Insurance/UNIX application interfaces with 14 incoming external data interfaces and 33 outgoing external data interfaces. The system creates over 193 Insurance related reports, 43 different forms and 30 letters.

The Premium Billing & Insurance Accounting application is a separate and independent system responsible for billing employers for both the employer and employee insurance premiums for active employees, and a limited subset of retiree, survivor, and COBRA subscribers. It also directly bills most individual subscribers (retiree, survivor, and COBRA subscribers). This application also receives and processes premium payments, claims reimbursements, and other vendor payments. General ledger transactions are stored in the system, while interfacing financial transactions to the State general ledger system. The Premium Billing & Insurance Accounting application interfaces with 2 incoming external interfaces and 9 outgoing external data interfaces. The system creates 26 reports, 2 forms and 21 letters.

The following table provides a brief description of each of the major insurance applications. The sections following this table describe the systems in more detail.

| Key Application | Purpose  | In Scope of the RFP? | Size |
| --- | --- | --- | --- |
| Insurance/UNIX | The legacy Natural/ADABAS application that manages subscriber enrollment, benefit eligibility, and premium calculations.System has approximately thirty (30) years of transactional data. | Yes | 33GB76 Files (Tables)90 Million records |
| Employee Benefit Services (EBS) | This is a web-based application that is used by participating insurance employer groups. Employers interact by accessing the Insurance/UNIX and Premium Billing & Insurance Accounting functions and data using this GUI interface. From EBS, employers can retrieve reports, requests for actions, monthly insurance billing statements, and employer invoice information. | Yes | Not an operational data store |
| MyBenefits | This is a web-based application for members to review current and future benefit options, perform open enrollment changes, and approve employer enrollment actions created in EBS. | Yes | Not an operational data store |
| EDM | This is the Electronic Document Management system used to scan, index, and maintain all workflow applications. For the insurance division, most high volume source documents are imaged upfront and PEBA staff processes the documents using the imaged data.System has approximately twenty (20) years of transactional data. | Yes | 15 million images |
| Premium Billing & Insurance Accounting  | This system creates monthly bills for insurance benefits, accepts and tracks receivables for premium payments, calculates claim reimbursements and vendor payments, and interfaces with the State general ledger accounting system.System has approximately thirty (30) years of transactional data. | Yes | 34 GB87 Files (Tables)102 million records |

Insurance/UNIX Application

The Insurance/UNIX application is the primary source for enrollment, eligibility and premium business transactions. This application was initially developed in the late 1990’s. It leverages an ADABAS database, which is the primary source of business functionality for the system. Insurance/UNIX data and business logic is accessed interactively from two other PEBA insurance division web-based applications, EBS and MyBenefits. The EBS system is used by employers to assist employees with enrollment in various PEBA insurance products. The MyBenefits web application provides self-service functionality for subscribers.

One of the key interfaces of this application is the daily and monthly enrollment extract files that are used to support the internal PEBA Premium Billing & Insurance Accounting system. Each night, all subscriber, coverages, and premium data is extracted from the UNIX ADABAS files, converted, and reloaded into separate MySQL data tables that are required for the Premium Billing & Insurance Accounting system. The Insurance/UNIX application also generates daily files of enrollment changes that are provided to third party claims administrators (TPA).

Insurance/UNIX Key Functions

The Enrollment/ UNIX application performs the following key functions:

| No. | Key Functions  |
| --- | --- |
| 1 | Allows users to key enrollment changes from paper forms for members. |
| 2 | Updates member coverage to reflect web-based enrollment requests. |
| 3 | Creates daily files of enrollment changes for TPAs. |
| 4 | Generates daily and monthly enrollment files used by the internal Premium Billing & Insurance Accounting system. |
| 5 | Stores historical member coverage and changes. |
| 6 | Stores coverage rates and calculates premiums. |
| 7 | Uses the FILE2TIFF system to generate and store correspondence. |

Insurance/UNIX Database

The Insurance/UNIX application uses an ADABAS database. The following lists the key data of the Insurance/UNIX application:

* Rates/Group files
* Subscriber Master file
* Dependent Master file
* Operation Transaction files
* Suspense files
* History files
* EBS and MyBenefits security information files

EBS

The Employee Benefit Services (EBS) is a web-based system used to support employer automation and interactions with PEBA. This system was developed internally and deployed in 2004. Employer designated benefit counselors can enroll new subscribers, review benefits, and make changes to existing subscriber coverages throughout the year. They can also receive monthly reports, accept work tasks requested from PEBA, and perform other member and PEBA support functions. They can retrieve enrollment and premium billing invoices (PDF documents) throughout the year. This application accesses the core Insurance/UNIX system, as well as billing information from the Premium Billing & Insurance Accounting system to display and process data for employers. This system has custom logic and replicate rules to support GUI drop-down windows and navigation. Where possible, broker calls are used instead of replicating Insurance/UNIX functions.

EBS Key Functions

The EBS application performs the following key functions:

| No. | Key Functions  |
| --- | --- |
| 1 | Enrolls and maintains members in available insurance products. |
| 2 | Provides online inquiry access to enrollment information. |
| 3 | Provides a single access point for groups to receive insurance reports, bills and data files. |
| 4 | Provides staff with an interface to approve/reject EBS initiated online enrollments. |
| 5 | Provides employers the ability to update their own contact information. |
| 6 | Provides integration with iaFolder (via IMGBITS software utility) to create new imaging folders. |

###

MyBenefits

The MyBenefits application is a Java web-based application available to members (active group, individuals, and local sub divisions and retirees). In addition to open enrollment, users can approve EBS transactions, review benefits, update contact information and update beneficiaries throughout the year. Similar to the EBS application, MyBenefits does not have a dedicated database but uses UNIX broker calls and ADABAS for data access and business processing. This system was developed internally and deployed in 2007.

PEBA runs multiple instances of MyBenefits. The two instances are used and load balanced by Citrix NetScaler application delivery controller.

MyBenefits Key Functions

The MyBenefits application performs the following key functions:

| No | Key Functions  |
| --- | --- |
| 1 | Allows members to create open enrollment transactions. |
| 2 | Allows members to update contact and beneficiary information (year round). |
| 3 | Allows members to review benefits (year round). |
| 4 | Allows members to approve enrollment transactions initiated in EBS by employer bent counselors. |

Premium Billing & Insurance Accounting

The Insurance Accounting system is a browser-based core custom software application that supports premium billing, cash/premium payment receipts, outgoing vendor payments, and accounting functions. All insurance premium receivables, vendor claim reimbursements (self-insured products), pass-through vendor payments (fully insured products) and trust accounting are performed in this system. The system generates all monthly premium bills, while managing interactions and updates to the State accounting and the State payment processing systems. The system is used by internal insurance accounting users (approximately 10) with regular access to the applications. While there is no direct access from this application for employers, data from this application (employer monthly premium bills, reports, etc.) is made available via the EBS employer insurance system.

The system is written in Ruby using the Rails web framework. The system was originally developed internally and deployed into production in 2010, and upgraded (retooled) in 2013. The system relies heavily on the Insurance/UNIX application for the historical subscriber enrollment data, coverage choices, and calculated premiums. The system runs three databases, Accounting, Billing, and Benefits. Each night a snapshot of the subscriber and benefit information is extracted and re-loaded into the Benefits MySQL database. The previous day’s historical enrollment records are deleted prior to the nightly data refresh. All key enrollment related data is replicated in this system via this nightly data refresh.

Premium Billing & Insurance Accounting Key Functions

The Premium Billing & Insurance Accounting application performs the following key functions:

| No. | Key Functions  |
| --- | --- |
| 1 | Creates individual and employer group bills. |
| 2 | Creates direct pay invoices to individual subscribers. |
| 3 | Manages cash receipts, accounts receivable and accounts payable transactions. |
| 4 | Provides general ledger functionality and balancing reports, while interfacing financial transactions to the State accounting system  |
| 5 | Integrates with the Team IA imaging system. |
| 6 | Facilitates claims reimbursement payments to TPAs. |
| 7 | Generates vendor and miscellaneous payments. |
| 8 | Manages the adoption eligibility and payment process. |

## Insurance Systems

### As-Is Data Flow Diagram



Note: Above diagram as of June 2016

**Imaging/Document Management Systems**

Retirement and Insurance both image documents into a third-party imaging system. Documents can be imaged from paper or converted from a digital file. Business users access the images via fat client on the desktops.

The Insurance division uses document scanning, indexing and workflow products by software solutions vendor Team IA. These products were customized and configured by the product vendor to meet PEBA’s business requirements. No integration occurs between the UNIX and Imaging systems with the exception of some screen scraping of SSNs done in one application. The workflow and Insurance/UNIX application run side-by-side on the desktop for user access, with little integration. The Insurance division application is called EDM.

The Retirement division also uses document scanning, indexing and workflow products by Team IA. These products were customized and configured by the product vendor to meet PEBA’s business requirements. No data integration occurs between the Retirement/UNIX and CRIS systems with the Team IA imaging system. The applications are run side-by-side in different windows. Retyping of key information is required to access imaged documents. The Retirement division application is called EDMS.

These two applications, EDM and EDMS are separate and independent applications.

**PART 3**

**BACKGROUND**

In 2014, PEBA undertook an Operational Assessment (OA) project to review PEBA’s operational processes, technology and resources, to define a future state operating model by using best practices and best approach to reduce risk and to recommend a roadmap documenting required activity, costs and resources. It is PEBA’s intent to purchase an off-the-shelf Benefit Administration System (BAS) that can be configured to PEBA’s needs. While customization will be needed to meet requirements, PEBA seeks a solution that most closely matches PEBA’s required functionality through out-of-the-box functionality with configuration rather than with the development of custom code. The RFP will ask Offerors to clearly describe how each requirement will be met in their proposed solution.

The new system will provide a unified, one stop improved customer experience with respect to all programs administered by PEBA. There will be one secure portal through which customers (members, subscribers, beneficiaries, dependents and employers) can conduct business with PEBA. All PEBA publications, as well as personal and electronic interactions with customers, will have a common language, appearance and feel. The new system and processes will enhance existing Customer Service capabilities including but not limited to the Customer Contact Center and Employer Contact Center. The new system will integrate retirement and insurance processes where further integration will improve operations and/or the efficiency and delivery of services to customers, including but not limited to; Common member and employer profiles/demographics, Common enrollment, Common imaging/document management, Common cash receipts, Death notification, and Employer reporting (integrated data). The new system and processes will enhance existing operational performance measurement capabilities. More robust reporting and operational analytics will be tracked and measured with respect to PEBA’s programs, including use of customer portals. The new system and processes will enhance existing data exchange functionality with all appropriate third parties, including all third-party administrators. The new system and processes will continue to support or enhance the privacy and security of PEBA’s information assets.

Over an approximate 5-year time period, PEBA’s modernization program will be executed through six program workstreams. Many workstream activities will be executed concurrently, requiring coordination, common understanding, and program management across the project teams. The new Benefit Administration System is expected to be deployed in two phases.

|  |  |
| --- | --- |
| **Workstream** | **High Level Description** |
| Workstream 0: Requirements Definition & Vendor Procurements | This workstream encompasses detailed system requirements definition, implementation planning, RFP creation, vendor procurements, and vendor contracting. |
| Workstream 1: Enrollment, Employer Reporting, CRM, & Insurance Premiums System Development | This workstream verifies and implements functionality associated with participant Enrollment, Employer Reporting, CRM, Insurance Premium Eligibility and Calculations, and maintaining active participants account information. This workstream represents the first of two phased deployments of functionality to the new BAS |
| Workstream 2: Retirement Claims & Benefit Payments System Development | This workstream implements functionality associated with Retirement, Disability and Death Claims, Refunds, Retiree Insurance and Benefit Payments, Benefit Payroll Maintenance, and Taxes. This workstream represents the second of two phased deployments of functionality to the new BAS |
| Workstream 3: Data Conversion & Bridging | This workstream analyzes, plans and executes all data conversion, bridging, and data reconciliation activities.  |
| Workstream 4: Organizational Change Management | This workstream coordinates training and communication, while managing the transition of stakeholders, participants, employers, and staff to new business processes and operational systems.  |
| Workstream 5: Program Management | This workstream manages project plans, progress, risks, and issues, while overseeing vendors, contracts, and program governance. |

Phase 1 Business Functions

The Enrollment, Employer Reporting, CRM and Insurance Premiums System Development workstream encompasses the following business functions:

* Retirement and Insurance Enrollment (Active and Retired)
* Person, Participant, and Beneficiary Management
* Employer Setup, Contacts, and Demographics
* Customer Relationship Management
* Employer Reporting
* Service Credit Calculations
* Service Purchase
* Insurance Eligibility and Premium Calculations (Active and Retired)
* Member and Subscriber Account and Status Management
* Insurance Open Enrollment
* General Ledger Integration
* Retirement Cash Receipts
* Insurance TPA Interfaces
* Individual and Group Premium Billing
* Premium cash receipts, accounts receivable and account payables

Phase 1 Systems to be retired

* Insurance/UNIX
* Premium Billing & Insurance Accounting
* MyBenefits
* EDM
* Member Access (partial)
* EBS (partial)

It is anticipated that temporary data bridging will be necessary to synchronize, primarily retirement plan related, data between the new BAS and the legacy retirements systems during gap period between Phase 1 and Phase 2.

Phase 2 Business Functions

The Retirement Claims and Benefit Payments System Development workstream encompasses the following business functions:

* Retirement Claims (i.e. Refunds, Service Retirement, Disability Retirement)
* Benefit Estimates
* Benefits Payroll
* Deductions
* Payee and Payment Maintenance
* Benefit Adjustments
* COLAs
* 1099s
* Tax Reporting
* Deaths

Phase 2 Systems to be retired

* Retirement/UNIX
* CRIS
* EDMS
* Member Access
* EBS

**PART 4**

**PROCUREMENT PROCESS**

PEBA is issuing this Request for Qualifications to solicit information from prospective offerors interested in providing a new benefits administration system for PEBA. By submission of a response to this Request for Qualifications (RFQ) you are applying for consideration to receive a Request for Proposal (RFP) for the purchase, implementation and deployment of a new benefits administration system.

PEBA will use a two-phase procurement process to select a Contractor to provide a new benefits administration system. This RFQ represents the first phase in the process to solicit information that PEBA will evaluate to determine which prospective offerors are the most highly qualified to successfully implement and deploy the new benefits administration system.

Selection will be based upon the scoring of the evaluation panel. In accordance with Section 11-35-1530, South Carolina Consolidated Procurement Code, prospective offerors will be ranked from most qualified to least qualified. Offers will then be solicited from at least the top two (2) qualified prospective offerors by means of a RFP. All submittals will be considered.

PEBA intends to issue a draft RFP for industry review to the short-listed prospective offerors and solicit their comments prior to issuing a final RFP. The intent of the draft RFP for industry review is to identify those areas of the RFP that may be in conflict with each other and to point out possible mistakes in the RFP. There may be an opportunity to submit questions. A meeting may be scheduled with the short-listed prospective offerors to facilitate this purpose. A final RFP will be issued to the short-listed prospective offerors.

During the procurement process outlined above PEBA intends to issue an RFP for Data Conversion and Bridging Services. PEBA will not award a contract for the implementation and deployment of PEBA’s new benefits administration system to the Contractor selected as a result of the RFP for Data Conversion and Bridging Services.

**PART 5**

**DESCRIPTION OF THE SCOPE OF WORK TO BE SOLICITED BY THE RFP**

The scope of work to be undertaken by the Contractor will be further defined in the RFP. The Contractor will implement and deploy PEBA’s new benefits administration system.

It is PEBA’s intent to purchase an off-the-shelf or framework based Benefit Administration System (BAS) that can be configured to PEBA’s needs. It is also PEBA’s intent to assume the operational responsibility for the new system.

The new BAS will have at a minimum the following core features to support the administration of PEBA’s defined benefit and health & welfare plans:

* Defined benefit plan administration
* Health & welfare plan administration
* Health & welfare vendor management and premium billing & collection
* Employer reporting
* Interfaces
* General Ledger integration
* Temporary data bridging
* Member Self-Service
* Employer Self-Service
* Electronic document management
* CRM
* Workflow
* Reporting

The Contractor will have primary responsibility for:

Initial System Installation

* Deployment of multiple environments including Development, Test, Training and Production
* Hardware & software documentation

System Configuration & Implementation

* Requirements Validation
* Detailed System Design
* System Development - Configuration and Custom Extensions
* Requirements Traceability

Testing

* System Testing
* Deployment
* Post Implementation Stabilization

Change Management

* Change Inventory and Organization
* Staff Development and On-the-Job Training for PEBA Business Analysts and IT Staff

System Training Material Development for

* Employers
* PEBA Staff
* Members

System Operational Processes

* Development Process and Standards
* Technical Deliverable Development and Process
* Code Analysis and Verification
* Configuration Management Procedures
* Infrastructure (Hardware and Software) Configuration Validation
* Defect Management and Remediation
* Disaster Recovery Plan

The Contractor will be a significant participant in:

Testing

* Validation and Acceptance Test Planning
* Validation Testing

Change Management

* Change Management Strategy
* Communications Planning
* Communications Delivery
* Employer Outreach and Education

System Training for

* Employers
* Staff
* Members

Data Work

* Data Conversion
* Data Bridging

Data Interface Implementation

* Data Sharing Interfaces (TPAs, DHEC, Medicare, etc.)
* Employer Integration Transactional Interface
* SCEIS (State’s HCM system) Transaction Interface
* Employer Contribution Interfaces/Certification

**PART 6**

**INFORMATION TO BE SUBMITTED**

All prospective offerors that intend to participate in this process must submit information only on their qualifications, experience, and ability to perform the requirements of the contract. It is not the intention of PEBA to receive specific recommendations or a prospective offeror’s approach as part of this RFQ.

Prospective offerors shall be held responsible for the validity of all information supplied in its response. Prospective offerors are advised that PEBA reserves the right to conduct an independent investigation of any information, including prior experience, identified in the responses. Should subsequent investigation disclose that the facts and conditions were not as stated, the offeror’s proposal may be rejected or contract terminated for default if after award, in addition to any other remedy available under the contract or by law.

Responses will be accepted only from the entity that would be implementing and deploying the new benefits administration system. Prospective offerors shall submit:

1. One (1) original marked “original” and five (5) identical paper copies of your response.
2. One (1) original marked “original” and one (1) labeled USB flash drives containing a copy of the prospective offeror’s response (in MS Word, MS Excel and/or PDF format where appropriate).
3. One (1) USB flash drive labeled “original redacted” containing a redacted version of your response.

Prospective offerors should submit the following information for purposes of evaluation. PEBA desires a detailed written submission so that the evaluation panel can make an accurate comparison of all responses received. Please be detailed in your responses. Restate each of the items below and provide your response to that item immediately thereafter. The response should include the following sections and should be presented in the listed order:

6.1 PROSPECTIVE OFFEROR’S QUALIFICATIONS AND EXPERIENCE

* 1. Provide a narrative designed to demonstrate to the evaluation panel your company’s qualifications, and advantages to PEBA in selecting your company to implement and deploy the new benefits administration system. The narrative should include the company’s experience, business expertise and success in implementing and deploying new benefit administration systems for public sector pension and health and welfare plans. Include any information you wish PEBA to consider about your company’s qualifications and experience.
	2. Provide a detailed description of your company and company history. Include your company’s principal business, ownership, number of employees regularly employed, how long your company has been in the business of providing software solutions for benefit administration systems (public sector pension and health and welfare plans), and number of offices and locations, including the location of the office that would serve as primary contact during this project.
	3. How many employees does your company have associated with benefit administration systems (public sector pension and health and welfare plans)?
* In the United States?
* Outside the United States?
	1. Provide a detailed description of projects of over one million ($1,000,000) in contract value for which your company has provided implementation and deployment services within the past five (5) years including those projects presently underway and those projects you currently still support. Include the project location, a description of the project, project/contract value, name of the owner for whom the work was performed, and a name, phone number and email address of owner’s representative. Please complete and submit the table on page 30 with your response.
	2. Provide references from at least three (3) projects of similar size and scope. Include the name of a contact person, their title, address, telephone number and e-mail address. References will be contacted and sent a written reference survey. As such, prospective offerors’ should submit references they are certain will complete and return PEBA’s written reference survey.

6.2 PROSPECTIVE OFFEROR’S ABILITY TO PERFORM

1. Provide information reflecting your company’s current financial position. Include a copy of your company’s audited financial statements for the last three (3) years.
2. Outline and describe the nature of any business relationships, partnerships, or co-ownership partnerships currently in place. Describe any ongoing responsibilities (financial, strategic, or otherwise) currently in place or that are a result of these relationships. Describe any recent (within the last 3 years) or pending mergers, acquisitions, or re-organizations that have been or may be encountered by your company in the next 12 to 36 months and the anticipated impact of such events on your company.
3. Provide specific detailed information regarding any and all situations where your company has defaulted on a contract. Provide specific detailed information regarding any and all situations where a contract has been canceled or in which a contract was not renewed due to alleged fault on the part of your company.
4. Indicate benefit administration system professional employee turnover of the company for the last five (5) years in terms of number of employees who have left versus the number hired. Also, describe situations where former consultants have gone to work for pension and/or health and welfare plans or where your company has hired consultants from pension and/or health and welfare plans.
5. In the last three (3) years has your company had a project or contract terminated prior to successful conclusion or implementation? If so, please describe the circumstances. Provide a list of any contracts that were terminated for convenience prior to the original contract end date and the reason for termination.
6. For any similar project completed within the last three (3) years, indicate any time where your company caused the delivery schedule to increase by more than 20% from the original schedule over the life of the project. Describe the situation, circumstances, variances, and other relevant information to explain the reason(s) for the variance.
7. Provide your company’s annual gross revenue during the last three (3) fiscal years. If 2017 is not yet available, provide an estimate for FY 2017 and include FY 2014. What was the percentage of gross revenues invested in Benefit Administration Systems research and development?
8. What was your company’s average annual gross revenue for public sector pension and health and welfare plans software and services for the previous three (3) fiscal years? What percentage of total gross revenues does the sales volume for public sector pension and health and welfare plans software and services represent.
9. Describe your company’s ability to finance additional costs that would be incurred by your company in the event your company is awarded a contract resulting from the RFP. State the amount your company would need to borrow, and provide documentation from the company’s lender stating its willingness to lend such amount to the company.
10. Provide specific detailed information regarding any legal action(s), including currently pending actions against your company in the past seven (7) years.
	* 1. Provide specific detailed information regarding whether your company has been subject to any sanctions or enforcement action related to legal or regulatory issues including but not limited to privacy compliance, HIPPA compliance, civil or criminal sanctions, or enforcement actions.
		2. Have you had any instance of a data breach or data loss? If yes, please describe the nature of the breach/loss and the manner in which the breach/loss was rectified.

**PART 7**

**EVALUATION PROCESS**

An evaluation panel has been established by PEBA to review the RFQ responses. Selection will be based upon the scoring of the evaluation panel. In accordance with Section 11-35-1530, South Carolina Consolidated Procurement Code, prospective offerors will be ranked from most qualified to least qualified on the basis of their qualifications, experience, and ability to perform. Offers will then be solicited from at least the top two (2) qualified prospective offerors by means of a RFP. All submittals will be considered. The determination regarding how many proposals to short list is not subject to review or protest.

|  |  |  |
| --- | --- | --- |
|  | For each of your installed systems:  | Does the installed system have functionality for: |
|  | Project Description | Location | Contract Value | Contact (Name, Phone, Email) | Name of Plan | # members/ employees covered | # employers administered | What phase is the project currently in (completed or in implementation) | Year Implemented | Health Insurance | Defined Benefit Plan | Interfaces with Defined Contribution Vendors | Interfaces with Insurance Vendors |
| 1. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 2. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 3. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 4. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 5. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 6. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 7. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 8. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 9. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 10. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 11. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 12. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 13. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 14. |  |  |  |  |   |   |   |   |   |   |   |   |   |
| 15. |  |  |  |  |   |   |   |   |   |   |   |   |   |

|  |  |  |
| --- | --- | --- |
|  | Total number of installed systems |   |
|  | Average age of installed systems |   |