

Exhibit B

When answering the questions below please indicate if there is an additional charge to accommodate the requested service. If your proposal does not fully comply with any provision, requirement, request or condition outline herein and there is no disclosure of your ability to accommodate or outline additional fees/charges, the City will assume it is inclusive of your services and pricing.

RFP questions for online enrollment system:

File Transmission:

- Will your system integrate with the City's payroll system "Oracle"?
 - Do you have other clients you service with this payroll system?
 - If so, please provide reference and contact information.
- Does your system have the capability to integrate with our payroll system, Oracle? Please provide details of your ability to customize along with any limitations.
- Please provide details of your auditing procedures both before and after actual payroll integration.
- Is your system capable of receiving file data in any format?
- Does your system export file data via HIPAA 834 format?
- Does your system export file data via non standard formats?
- Does your system accommodate more than one file format for exports simultaneously to various carriers and vendors?
- Does your system provide full file and/or change only integration?
- Please outline in detail the process you follow when implementing a new carrier to establish the file transmission process.

Reporting:

- Does your system provide customized/adhoc reporting? And if so, is there a limit to the number of reports available within a specific timeframe? If so, please disclose and identify additional cost for any over the allowed number.
- Please provide samples of your standard reporting along with details of data captured for each standard report.
- Please outline your turnaround times for standard and adhoc reporting? Do timeframes differ based on complexity of request?
- Are there any additional charges to provide additional custom reports?
- Does your system provide discrepancy reporting? Please explain how this process works.

- Does your system have the capability to produce self bill invoicing for the City by carrier/vendor on a monthly basis?
- Does your system have the ability to accommodate invoicing for Administration fees (for the TPA) and Premium (for budgeting/finance purposes) at the same time?

Open Enrollment:

- Does your system have a “blackout period” that will need to be observed by the City to prepare for open enrollment and load renewal decisions?
- Does your system have the capability to simultaneously run new hire enrollment and qualifying event changes during both the preparation for open enrollment and during the active open enrollment period?
- Does your system allow for secure access to enrollers (other than City staff) “real time”? If so, will your system track which enroller made changes or enrollment elections for the employee? Will it provide a date and time stamp for tracking?
- Does your system track historical open enrollment data and elections from year to year on the same platform?
- Does your system support dependent audits conducted by the City? If so, please provide details.
- Does your system recognize Guarantee Issue levels for life insurance and have the capability of providing enrolling employee/retiree guidance for amounts over the GI level? If so, please outline how this is handled.
- Do you provide support for onsite enrollment for (a) educational meetings and/or (b) assisting members through enrollment with the online system? If so, is there a limit – please provide details?
- Do you provide equipment (ex. laptops) during scheduled open enrollment meetings?
- Does your system provide printed and/or electronic employee/retiree confirmation statements?
- Does your system have the ability to allocate City “benefit dollars” as applied and directed by City rules? Can they be applied to multiple plan offerings?
- Does your system track an employee’s open enrollment elections made at different times throughout the same open enrollment period?

- Does your system have the capability to generate custom letters based on different scenarios such as FMLA, workers compensation leave and qualifying events?
- Does your system allow members to reset passwords individually? If not, please describe how this is done and who is responsible for resetting passwords.
- Does your system allow unlimited customization of site language and enrollment screens? If not, please outline details of limits.
- Is there a limit to the number of forms, document or hyperlinks within your system? If so, please identify what they are.
- Does your system allow for mapping of enrollment elections based on past or existing enrollment elections?
- Does your system allow for mapping of enrollment elections from one carrier plan to another?
- Does your system allow mapping for enrollment into default plan elections?
- Does your system accommodate and track employee eligibility based on City leave policies?
- Does your system provide payroll deduction files for past and future deduction amounts simultaneously to accommodate City payroll schedules?

Life Insurance/Pension:

- Does your system accommodate and track primary and contingent beneficiary designations for multiple lines of coverage by line of coverage?
- Does your system allow for secure electronic signature?
- Does your system track changes with date and time stamping?
- Does your system provide validation to ensure 100% allocation of beneficiary allocations?

Qualifying Events:

- Please provide details of how your system handles processing (denial/approval process) for Qualifying Events. (Include any City Personnel involvement.)
- Does your system track City employment history and corresponding eligibility for benefits?

- Does your system accommodate different coverage offerings based on employment status and employee type? (ex. COBRA, Retiree, Part-time, Full-time)

Training:

- Please outline training provided to both City staff and members (active/retiree/COBRA) on use of the member portion your system.
- Do you provide training to City staff for the administrative portion of your system?
- Do you provide paper and/or electronic training/reference guides to City staff?
- Is there a limit to the number of training hours or sessions offered in your proposal? If so, please outline these limits and provide pricing for any additional hours or sessions.
- Do you provide onsite training? If yes, are there an additional fee and/or limitation to the number of occasions? If yes, please provide details.

Administration:

- Does your system have a limit for the number of payroll codes and payroll schedules you can accommodate? If so, please identify.
- Does your system accommodate client specific benefit rules?
- Does your system allow the City benefits administrator(s) to see historical entries and elections?
- Please provide a full listing of carriers and vendors with whom you currently transmit data.
- Please identify in detail your file testing process and corresponding timelines.
- Please outline in detail your Systems Security Policy.
- Please outline in detail your Disaster Recovery Policy.
- Is your system SAS 70 certified? If yes, please provide level of certification.

Customer Support:

- Please provide details of the customer service your team and system administrations will provide the City for ongoing support and disclose any limits to the number of hours of support included in your proposal.
- Is training provided by team members of the online company or are they outsourced to another organization? If they are outsourced, please identify company utilized by name and background.
- Please identify team members to be assigned to the City should award be granted along with resume of qualifications and their physical location.
- Does your system provide City staff and/or member support? If so, do you provide:
 - Toll free number(s)?
 - Email address?
- Please provide the hours of operation for both your Toll Free access and Email support.
- Do you limit the number of hours or interactions? If so, please provide details on what they are and cost for additional hours or interactions should the City wish to pursue them.
- Please provide response time for use of these services.

Data Management: Please provide details of what your system will provide with regards to data management for the following:

- Administrator ability to view, add, delete and update all records with a date tracking system.
- History of actions made to any record within the Administration system.
- Personal data.
- Personnel data.
- Retiree data and tracking of program offerings to Retirees.
- Leaves of absence.
- COBRA inclusive of ability to track any City subsidies.

Pre-population of data

- Does your system provide pre-population for existing plans, covered members, and dependents?
- Does your system provide pre-population audits for member and plan data? Please explain this process and provide a timeline?