

RFP 2024-002 Automated Identity Verification Questions and Answers (Q&A)		
Number	Questions	Answers
1	What contact center and CRM platforms does BERS use?	The contact center is Cisco platform, Comprehensive Pension Management System (CPMS).
2	What is meant over 100,000 unique case files?	We have over 100,000 files. Each file is associated with a current or former BERS member, retiree, or beneficiary.
3	What (if any) language support and/or translation requirements does BERS have?	English and Spanish for now. In the future, we are considering adding Cantonese or Mandarin.
4	Regarding references, do they have to be from the Prime or can they include references from the Prime's tech partners?	References should be from clients who have received services from the vendor who will be performing the services for BERS.
5	How frequently do these 100,000 unique membership case files get accessed and same applies to there are 50,000 active members. How often do they log in?	Your solution should be able to support approximately 25,000 logins a month.
6	Will the number of active members expand over time?	Yes, we expect new enrollment of members. We expect an influx of approximately 30,000 members in the coming months due to recent legislation. The number of active members will continue to increase over time. We expect a similar growth in the number of MSS users (BERS' Member Self Service Online Portal) .
7	Number of members expectation on number of members it expand to?	We don't have a fixed number. Approximately another 30,000 members will join.
8	Can you please clarify what is meant by " <i>Seamless integration: Solution appears as part of CPMS/MSS application</i> " Section 7.3.1c	The chosen user authentication application must work with CPMS without any conflict.
9	Can we ask Vitech some tech questions about MSS?	This will be discussed following vendor selection for award.
10	Can you provide more information on the "decision matrix" referenced in - E. Automated decisions: Users are categorized based upon a "decision matrix". ?	The authentication will be based on a score, pass/fail/escalate. This is dependent on all the information gathered.
11	Just to confirm - the questions asked and answers provided during this conference will be published <i>prior</i> to the June 3 date, is that correct?	Question and Answers will be posted on the BERS website by June 3, 2024.
12	Just to confirm, the last slide showed 4PM ET as the questions deadline, but I think the RFP has 5PM ET?	The RFP deadline for the questions is correct, Monday, May 13, 2024 no later than 5:00 PM (EST).
13	Will we get these slides?	Yes, refer to Addendum #1 with the pre-proposal conference powerpoint slides.
14	Section 2.1, Overview, 2nd paragraph - states that BERS has 50K active members and 100K+ unique membership case files. how many should the system be expected to handle. I believe the answer from BERS was 100K. Would you please explain the relationship between active members and unique membership case files as I'm not clear on why 100K simultaneous user requests, from a system sizing standpoint, would be required if there are only 50K active members. I may have misunderstood the response so apologies if this is the case.	Every member is identified as a record (case file). The 100,000 includes active and non active members. Active members are those members who are currently working in a BERS-eligible job. Inactive members refers to those members who have left a BERS-eligible job, but are entitled to collect a pension once reaching retirement age. Inactive members, may also include non-vested member accounts (ineligible to collect a pension benefit), whose membership may terminate if they do not return to service. Member accounts will also include BERS retirees, deceased members and retirees, as well as beneficiary files.
15	Would it be a fair assumption to make that 50K members could "potentially" access the system at the same time - peak usage - but most likely won't. Do you have any statistics supporting peak usage numbers on the current system?	Currently, simultaneous login is about 500.
16	What would be a reasonable year-over-year percent <u>net</u> active member growth number to assume? Would it be 2%, 5% or more?	In addition to influx due to auto enrollment legislation (approximately 30k), yearly growth is about 3%.
17	For pricing purpose, please provide an estimated annual or monthly volume for new account openings.	In addition to influx due to auto enrollment legislation (approximately 30k), yearly growth is about 3%.
18	For pricing purposes, please provide an estimated annual or monthly volume for logins.	Your solution should be able to support approximately 25,000 logins a month.

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19	RFP Section 2.5(2) on page 4 requests five years' experience in "cloud hosted" identity verification. Must the offering be cloud-based? Is BERS open to proven, secure data-center hosted solutions used widely in similar public sector operations?	The offering must be cloud based.
20	RFP Section 3 on page 6 requests the option for escalation to a live agent who assists with identity verifications and clarifications. Pursuant to BERS' desire for competitive pricing, highlighted in the RFP Addendum 1's pre-proposal conference presentation, it's important to note that 24/7 live agent support can be costly. It requires staffing even during nights and weekends when there will be very few if any access requests. Is BERS open to a call center with more limited but still widely available hours?	Yes.
21	RFP Section 3 clearly requires an IAL2 use case. However, the section refers to document authentication as the only form of identity verification. Full Kantara-approved IAL2 workflows require two strong methods plus one superior method (such as document verification) for authentication. Is BERS requesting a full, certified IAL2 workflow, or only document authentication for this project?	Yes, BERS is requesting for a full IAL2 workflow.
22	RFP Section 3.1(G)(1)(b) on page 8 requests the AAL2 standard. This applies to workflows that issue and manage credentials (typical to an IAM-type engagement). However, based on services the RFP requests, there is no apparent use case for AAL2. Furthermore, there is only one document-authentication vendor in the marketplace that offers AAL2 services. Any other vendor must partner with an IAM vendor to meet this standard – even though the services requested do not require credential management – putting any other vendor at competitive disadvantage. Please describe the use case that would require AAL2 for the services requested, or indicate if BERS is willing to remove this requirement from the list of standards.	BERS will evaluate all proposals that meet the Mandatory Minimum Qualification Requirements, Section 2.5.
23	RFP Section 3.1(G)(1)(c) on page requests the FAL2 standard. However, it does not appear to apply to the scope of services that the RFP envisions. Please describe the use case where FAL2 would apply, or indicate if BERS is willing to remove this requirement from the list of standards.	BERS will consider this as option.
24	RFP Section 3.1(G)(3) on page 8 requests certification for handling of PII data compliance. Please specify which, if any, certifications for PII data compliance are envisioned in this requirement.	ISO 27018
25	The RFP contains multiple terms that refer to BERS and/or retirees accessing your systems. The terms include: "customer," "client," "user," and "end user." Most appear in Sections 3.2(C) and 3.2(D) on page 9. However, the application of these terms seems to be inconsistent. Please standardize/define them as they appear throughout the RFP to clarify whether they apply to BERS or to the individuals accessing your systems.	Customer, client, user, and end user are all identified as BERS members that includes active members, retirees, vested members, non-vested members.

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26	RFP Section 3.2(D)(2) on page 9 requests compliance with HIPAA. HIPAA applies to protected health information (PHI) such as medical diagnosis, procedure, treatment information, etc. Given that the services BERS requests are for identity verification, please describe a use case in which PHI would be involved.	HIPAA is not a requirement. However, we need to know the rest of the standard compliances are managed by your company.
27	Are Partnerships allowed for the submission of Automated Identity Verification services proposal? If so, does the qualification criteria apply for both the companies?	Yes, it will be treated as the same.
28	Regarding the Women Owned Business Enterprise - 10% price preference - is it applicable for New Jersey based WBE Certification?	No. Price preference are for vendors that are New York City M/WBEs.
29	"The system should be capable of providing a real-time dashboard and historical data reports." Page 6 Scope of Services to be provided. What metrics are expected on the dashboard ?	Dashboard is needed for trend analysis, customization and generation of reports. Dashboard current data should be 24 hours or less.
30	The system should use multi-factor authentication, with emphasis on "something you have" (a government-issued identification document) and "something you are" (facial features matching the photo on the identification document). Page 6 Scope of services to be provided. Outside of verification, do you also need additional factors of MFA, or does BERS want our solution to leverage an existing MFA solution? What is the name of the existing MFA solution?	No.
31	Is BERS planning to integrate the Automated ID verification service into the MSS portal within CPMS for member access? Or is the integration envisioned to be accomplished beyond the MSS portal?	Yes, integrating into the MSS portal.
32	In order to accomplish the integration, will: BERS contract for integration services separately? Perform the integration work with BERS staff? Or Is BERS requesting that the successful vendor perform the integration work?	Successful vendor perform the integration work.
33	What is BERS vision for the Automated ID verification service in terms of ongoing authentication of returning member identities that have already been proofed/verified?	Authentication should be done at session level.
34	Does BERS envision the successful vendor to be a Credential Service Provider (CSP) with both IAL and AAL services ?	BERS will evaluate all proposals that meet the Mandatory Minimum Qualification Requirements, Section 2.5.
35	Does BERS currently use any of these upstream services for identity management/governance: Okta, Microsoft or Google?	No.
36	RFP item 3.1 G specifies IAL2, AAL2, FAL2 and PAD2 800-63 standards. Please describe fully the vision of BERS with respect to AAL2 and FAL2.	FAL2 is optional.
37	Does the contractor need to comply specifically with ESSTA if there are no NY State employees on this job?	No.
38	Approximately how often do members visit the BERS system annually?	Your solution should be able to support approximately 25,000 logins a month.
39	Section 3.1 Required Elements - D. Simple user experience (pg 7): Are there any requirements for translation or language support?	English and Spanish.
40	Section 3.1 Required Elements - G. Compliant with industry standards - "1.d Presentation Attack Detection Level 2 (PAD2)." (pg 8): For this requirement, can you please confirm "Presentation Attack Detection Level 2 (PAD2)" refers to liveness detection as defined by NIST SP 800-63?	Yes.

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41	Section 3.2 Proposal Discussion & 4.2.3 Qualifications and Experience (pgs 8-11) - Please confirm Proposers should include responses to Section 3.2 Proposal Discussion in the "Qualifications and Experience" section of their response package.	Yes.
42	Attachment D - Price Certification Clause (pg 37)- Please advise if Proposers need to include a completed copy of Attachment D in their response package.	Yes.
43	Attachment G - Iran Divestment Act Compliance Rider for New York City Contractors (Pgs 40-41) - Please advise if Proposers need to include a completed copy of Attachment G in their response package.	Yes.
44	Attachment I - Insurance Requirements (Pgs 43-49) - Please advise if Proposers need to include a completed copy of Attachment I in their response package.	Yes.
45	Attachment J - Vendor's Acknowledgment of the New York State Freedom of Information Law (Pg 50)- Please advise if Proposers need to include a completed copy of Attachment J in their response package.	Yes.
46	General - Contract Vehicles - Would BERS consider awarding this workscope under the umbrella state IT contract, if the selected awardee's products are available on that vehicle? This would eliminate duplicative efforts on the acquisition staff.	We would have to look into it. Utilizing the State Contract requires following OGS's rules regarding the solicitation.