IT Professional Technical Services
Master Contract Program
T#:902TS

Statement of Work (SOW)
For Technology Services
Issued By
Minnesota State Retirement System (MSRS)

Project Title: Web Redesign

Service Categories:

- Web Design & Development – HTML/ XML/ DHTML CSS Javascript
- Web Applications Specialist - Java/JSP/Servlets

Business Need

MSRS uses multiple websites to relay information to a variety of constituencies. In the spring of 2012, MSRS began the process of redesigning the website to combine three different websites (www.msrs.state.mn.us, www.mndcplan.com, and www.msrsinfo.com) into one common site with a common look/feel consistent with MSRS printed publications. This site was designed to be a content-managed site to allow for quick updates by subject matter experts and the integration of multi-media web tools for plan participants.

Overall, the project is about 80% complete; the site design, and approximately 90% of the content is complete for the new site. This Statement of Work (SOW) seeks a Vendor to make necessary design customizations to website elements that are not provided as an out-of-box feature in the Liferay CMS product. It also seeks assistance in launching the modified site in a new environment.

For additional information, see Questions and Answers in **Attachment E**.

Project Deliverables

The work under this Statement of Work (SOW), detailed in the **Vendor Tasks** section, involves finishing development on a Liferay-based website, launching the website, and developing local capacity by training business and technical users. Specific deliverables include:

- Five Java portlet calculators (created by another Vendor) are tested and integrated into the website
- Liferay-based search function replaced with Google-, or Google-comparable search function
- Business users able to upload and edit content
- Website format and layout are customized to meet MSRS needs, particularly in the "FAQ" and "News" features
- Enable archival of old content
- Successful launch of browser-compatible website in coordination with MN.IT (Office of Enterprise Technology)
- Training provided so that:
    - Business users can tag content to improve search results, can add/remove pages, and can edit formatting of the website
    - Technical support users (Java developers) can implement future Java-based changes to the website framework; specifically Java-based calculators and interactive Java portlets

- Current documentation reviewed and corrected if necessary, and developer documentation on customizations (non-Liferay programming/configuration) to assist future web development

Vendor Tasks

A. Website Development

1. Integrate at least five Java portlet calculators that were created by another vendor.
2. Replace the Liferay out-of-the-box search feature with a Google- or comparable search feature.
    a. Ensure that the search feature results in the most relevant information presented for the website user.
    b. Ensure that all archived or deleted pages are excluded from search.
3. Complete customization of Liferay (out-of-the box) calendar to add color for specific types of events, customize the events listed on the calendar, and remove events that will not be used on the live site.
4. Ensure all icons and pictures used on the site are available for business users to add to the site.
5. Discuss customization of items specific to the site map layout, formatting of *Frequently Asked Questions* feature of site, and the *News* pages.
6. Modify the dynamic data list from existing HTML format to a rich text editor.
7. Assist with the removal or archive of old content to ensure that it is not viewable on the live site.
8. As part of professional project management, vendor will provide:
    a) Clear means of communication
    b) An objective change-control procedure
    c) A process to recognize and manage risks
    d) An approach for acceptance of project deliverables by MSRS users and technical team

    Note: Prior to work beginning, MSRS will execute a signed Work Order Contract with a detailed Workplan with the vendor selected under this SOW. Any changes to a vendor's Workplan will be subject to the **Change Orders** and **Amendment** provisions (see **General Requirements**, below) in a mutually signed Work Order Contract.

B. Launch

1. MN.IT hosts the MSRS website. The Vendor will work in consultation with MN.IT to troubleshoot deployment issues. The Vendor will ensure live deployment of the website to the public no later than the date listed in the **Project Schedule** section, below.
2. Ensure the website can be accessed and available to the following web browsers:
    a. Chrome 21
    b. Firefox 14
    c. Internet Explorer 9
    d. Internet Explorer 8
    e. Safari 5.1

C. Training

1. Business User Training: At least 6 hours of training for business users (not technical staff) on all content-based features of Liferay, workflow, security/user setup, including:
    a) How to add appropriate tags for search results
    b) How to remove old or bad pages on the site
    c) How to update stylesheets and/or fonts

2. Training of Java Developers: At least 6 hours of training on all back-end features of Liferay to ensure that Developers can support Business Users, including the following topics:
   a) Implementation/modification of any Java-based changes to the website framework and any customized features such as the *Frequently Asked Questions* and *News* sections of the site.
   b) Addition of calculators and/or other interactive portlets

D. Documentation

1. Review user documentation created by a vendor whose contract expired 12/31/2013. Vendor will confirm the accuracy, and correct any errors in the documentation.
2. Develop detailed technical documentation of any processes or procedures that are customized and not part of the Liferay (out-of-the-box) software package for use by technical staff persons to be reasonably able to extend, customize, or troubleshoot the system.

Project Requirements

MSRS implementation requirements include:

- For most of the Project, the Vendor will be expected to work remotely via VPN or offline. MSRS will provide VPN tokens.
- Compliance with the Statewide Enterprise Architecture
- Compliance with Statewide Project Management Methodology
- Compliance with applicable industry/agency standards
- Training will take place at the MSRS St. Paul location: *60 Empire Drive, St. Paul, MN 55103*.
- Vendor must pass background checks.

Project Schedule

- The Project is estimated to start: **February 10, 2014**
- The Project, including training, must be completed before: **April 18, 2014**

Project Environment (State Resources)

MSRS staff will provide:

- VPN access and VPN tokens to connect to test and production environments
- Necessary files/documentation/programs to facilitate development, testing, and documentation
- A single Project Manager during the project with three (3) to four (4) additional staff persons available as needed, approximately 2-5 hours per week
- A test and production environment utilizing Websphere v7.5 as the application server and DB2 v10 for the database running in a Linux environment
- Liferay software and currently completed customizations

For additional information, see Questions and Answers in **Attachment E**.

Required Skills (to be scored as pass/fail)

Eligible vendors must be approved under the 902TS Master Contract Program in all these categories:

- Web Design & Development – HTML/ XML/ DHTML CSS Javascript
- Web Applications Specialist - Java/JSP/Servlets

Desired Skills

- Strong knowledge of Liferay software; preferably a Liferay service partner
- Experience deploying a website developed in Liferay in a Websphere 7.5 environment

- Experience in instructor-led training
- Demonstrated ability to write user- and technical documentation

Process Schedule

Event	Date/Time
Deadline for Vendor Questions	1/27/2014 at 2:30 p.m. CST
Anticipated Posted Response to Questions	1/28/2014
Vendor Proposals due	1/30/2014 at 2:30 p.m. CST
Anticipated MSRS Proposal evaluation begins	1/31/2014
Anticipated MSRS Proposal evaluation & decision completed	2/3/2014

Questions and Answers

Any questions regarding this Statement of Work should be submitted via e-mail according to the date and time listed in the **Process Schedule** to:

Daniel McLean, Contract Administrator
Minnesota State Retirement System (MSRS)
daniel.mclean@msrs.us

Questions and answers will be posted on the Office of MN.IT Services website (http://mn.gov/buyit/statements/mcp902ts_active.html) according to the **Process Schedule**.

Other persons ARE NOT authorized to discuss this Statement of Work or its requirements with anyone throughout the selection process and Vendors should not rely on information obtained from non-authorized individuals. If it is discovered a Vendor contacted other State staff other than the individual above, the Vendor's Proposal may be removed from further consideration.

The State reserves the right to determine if further information is needed to better understand the information presented. This may include a request for a vendor presentation and/or an interview.

Proposal Evaluation Process

This Statement of Work does not obligate the state to award a work order or complete the assignment, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest. The Agency reserves the right to reject any and all Proposals. Proposals will be evaluated on a 1,000-point scale:

Evaluation Criteria	Points
Resource experience with the listed Required and Desired skills	200 points
Resource experience with similar projects	300 points
Quality of Workplan	200 points
Cost Proposal	300 points

The Cost Proposal with the lowest cost receives 300 points. Other Cost Proposals are evaluated according to this formula:

$$\frac{\text{Amount of Cost Proposal with Lowest Cost}}{\text{Amount of Vendor's Cost Proposal}} \times \text{Maximum Price Points (300)}$$

How to Propose

Vendor Proposals should include the following documents:

1. Cover Letter

a) Vendor Firm Name
b) Vendor Street Address, City, State, and ZIP Code
c) Vendor's Contact's name, direct phone number, and email
d) Whether the Vendor is claiming certified "Targeted Group Businesses or Individual" status (see General Requirements, below)
e) Name(s) of individual(s) to be assigned to this project (one or more individuals, also known as a "Resource")

2. Overall Experience

a) Attach résumés (s) for proposed Resource individuals in addition to the narrative description. Be certain the Résumés have dates of work and notes whether the Resource was an employee or subcontractor. *Note:* Résumés and other information about personnel should not, if possible, contain personal telephone numbers, home addresses or home email addresses. If it is necessary to include personal contact information, please clearly indicate in the Proposal that personal contact information is being provided.
b) Provide narrative, including companies and projects where the Resource has demonstrated the **Desired Skills**, listed above; in particular, provide a list of similar corporate websites completed by this Resource in the past three years.
c) Include the name of at least one reference who can speak to the Resources work on similar projects completed in the past three years. Include the company name and address, reference name, reference email, reference phone number and a brief description of the project this Resource completed.

3. Workplan

Provide a comprehensive Workplan document:

a) Describe how the Resource plans to complete each of the tasks in the **Vendor Tasks** section, above**.** Provide the proposed start and end dates, and the individual(s) responsible for each task. (Cost information for each task should be provided separately in a **Cost Proposal**, as described below.)
b) Vendors are encouraged to propose additional tasks if they will substantially improve the results of the Project. These items should be separated from the required items on the **Cost Proposal**.
c) Describe how the Resource will apply Project Management as described in Vendor Tasks; in particular, describe how the Resource, subject to the **Amendment** and **Change Orders** provisions (see **General Requirements**, below) in a signed Work Order Contract, will manage communication, project risks, changes, and deliverables.

4. Cost Proposal

In Microsoft Excel spreadsheet format, provide the cost detail for each task in the Workplan, with the hourly rate, proposed number of hours, and individual(s) responsible for each task (see example, **Attachment A**). Because the Cost Proposal portion of the evaluation is scored *after* the technical merits are evaluated, vendors should only provide cost information in **Attachment A**.

5. Applicable forms/documents

a) A Conflict of Interest list as it relates to this project (see **Conflicts of Interest**, under **General Requirements**, below)
b) Affidavit of Noncollusion (**Attachment B**)
c) Veteran-Owned/Service Disabled Veteran-Owned Preference Form, if applicable (**Attachment C**)
d) Resident Vendor Form, if applicable (**Attachment D**)

Proposal Submission Instructions

Send completed Proposals by email to:

Daniel McLean, Contract Administrator
Minnesota State Retirement System (MSRS)
daniel.mclean@msrs.us

Proposals must be received by the due date and time specified in the **Process Schedule** section, above.

General Requirements

Proposal Contents

By submission of a Proposal, Vendor warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the Vendor to suspension or debarment proceedings as well as other remedies available by law.

Indemnification

In the performance of this contract by Contractor, or Contractor's agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

1) Intentional, willful, or negligent acts or omissions; or
2) Actions that give rise to strict liability; or
3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

Disposition of Responses

All materials submitted in response to this SOW will become property of the State and will become a public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected vendor. If the Vendor submits information in response to this SOW that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Vendor must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this SOW, the Vendor agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Vendor to be proprietary or trade secret materials.

Conflicts of Interest

Vendor must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for Proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The Vendor warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage.

The Vendor agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the Vendor was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

IT Accessibility Standards

All documents and other work products delivered by the vendor must be accessible in order to conform to the State Accessibility Standard. Information about the Standard can be found at: http://mn.gov/oet/policies-and-standards/accessibility/.

Nonvisual Access Standards

Nonvisual access standards require:

1) The effective interactive control and use of the technology, including the operating system, applications programs, prompts, and format of the data presented, are readily achievable by nonvisual means;
2) That the nonvisual access technology must be compatible with information technology used by other individuals with whom the blind or visually impaired individual must interact;
3) That nonvisual access technology must be integrated into networks used to share communications among employees, program participants, and the public; and
4) That the nonvisual access technology must have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

Preference to Targeted Group and Economically Disadvantaged Business and Individuals

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group (TG) Businesses and individuals submitting Proposals as prime contractors will receive a six percent preference in the evaluation of their Proposal, and certified Economically Disadvantaged Businesses and individuals submitting Proposals as prime contractors will receive a six percent preference in the evaluation of their Proposal.

Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at mmdhelp.line@state.mn.us. For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

Vendors should indicate their intent to claim TG status on their Proposal Cover Sheet.

Veteran-Owned Preference

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference on state procurement to **certified small businesses** that are **majority-owned and operated by**:

(1) Recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;

(2) Veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or

(3) Any other veteran-owned small businesses certified under section 16C.19, paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time.

If you are claiming the veteran-owned preference, **attach documentation, sign and return the Veteran-Owned Preference Form** (**Attachment C**) **with your response to this solicitation.** Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.

Foreign Outsourcing of Work Prohibited

All services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision also applies to work performed by subcontractors at all tiers.

Attachment A - Cost Proposal

(Note: Add rows/columns as necessary.)	VENDOR NAME				Travel	Other		Total
Name and/or title	Name/title	Name/title	Name/title	Name/title	Mileage			
Hourly rate	$0.00	$0.00	$0.00	$0.00	$0.56	$0.00	$0.00	
Tasks (provide hours per staff person as applicable, or cost per item)								
Task								
Subtask (provide hours/miles to right)								
Subtask								
Subtask								
Total Hours	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total Dollars	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Task								
Subtask (provide hours/miles to right)								
Subtask								
Subtask								
Total Hours	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total Dollars	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Task								
Subtask (provide hours/miles to right)								
Subtask								
Subtask								
Total Hours	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total Dollars	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Task								
Subtask (provide hours/miles to right)								
Subtask								
Subtask								
Total Hours	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total Dollars	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Additional Tasks (if applicable) - Any suggested tasks outside the requested Scope of Work will be evaluated separately.								
Subtask (provide hours/miles to right)								
Subtask								
Subtask								
Total Hours	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Total Dollars	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

TOTAL	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

Affidavit of Noncollusion

State of Minnesota

Instructions: Please return this completed form as part of your Proposal.

I swear (or affirm) under the penalty of perjury:

1. That I am the Responder (if the Responder is an individual), a partner in the company (if the Responder is a partnership), or an officer or employee of the responding corporation having authority to sign on its behalf (if the Responder is a corporation).
2. That the attached proposal submitted in response to the **Minnesota State Retirement System (MSRS) Web Design Statement of Work (RFP15)** has been arrived at by the Responder independently and has been submitted without collusion with and without any agreement, understanding or planned common course of action with, any other Responder of materials, supplies, equipment, or services described in the Request for Proposals, designed to limit fair and open competition.
3. That the contents of the proposal have not been communicated by the Responder or its employees or agents to any person not an employee or agent of the Responder and will not be communicated to any such persons prior to the official opening of the proposals.
4. That I am fully informed regarding the accuracy of the statements made in this affidavit.

Authorized Signature

Responder's Firm's Name: _____

Print Authorized Representative name: _____ Title: _____

Authorized Signature: _____ Date (mm/dd/yyyy): _____

Notary Public

Subscribed and sworn to before me this:

_____ day of _____, _____

_____

Notary Public Signature

_____

Commission Expires (mm/dd/yyyy)

Attachment C

STATE OF MINNESOTA
VETERAN-OWNED PREFERENCE FORM

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference in the amount bid on state procurement to **certified small businesses** that are **majority-owned and operated by**:

(1) Recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;

(2) Veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or

(3) Any other veteran-owned small businesses certified under section 16C.19, paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time. When responding to a Request for Bid (RFB), the preference is applied only to the first $500,000 of the response. When responding to a Request for Proposal (RFP), the preference is applied as detailed in the RFP.

If you are claiming the veteran-owned preference, **attach documentation, sign and return this form with your Proposal.** Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.

I HEREBY CERTIFY THAT THE FIRM LISTED BELOW:

My firm is a certified small business and it is majority-owned and operated by an eligible person as defined by Minn. Stat. § 16C.16, subd. 6a.

___**Yes** ___**No** (must check yes or no) **State the type of documentation attached:**_____

DOCUMENTATION MUST BE PROVIDED FOR ONE OF THE FOLLOWING REQUIREMENTS:

___ (1) recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;

State the type of documentation attached: _____

___ (2) veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs;

State the type of documentation attached: _____

___ (3) any other veteran-owned small businesses certified under Minnesota Statute Section 16C.19, paragraph (d).

State the type of documentation attached: _____

Name of Company: _____ Date: _____

Authorized Signature: _____ Telephone: _____

Printed Name: _____ Title: _____

IF YOU ARE CLAIMING THE VETERAN-OWNED PREFERENCE, **ATTACH DOCUMENTATION, SIGN AND RETURN** THIS FORM WITH YOUR PROPOSAL.

Attachment D

STATE OF MINNESOTA - RESIDENT VENDOR FORM

In accordance with Laws of Minnesota 2013, Chapter 142, Article 3, Section 16, amending Minn. Stat. § 16C.02, subd. 13, a "Resident Vendor" means a person, firm, or corporation that:

(1) is authorized to conduct business in the state of Minnesota on the date a solicitation for a contract is first advertised or announced. It includes a foreign corporation duly authorized to engage in business in Minnesota;
(2) has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid or proposal for which any preference is sought;
(3) has a business address in the state; and
(4) has affirmatively claimed that status in the bid or proposal submission.

To receive recognition as a Minnesota Resident Vendor ("Resident Vendor"), your company must meet each element of the statutory definition above by the solicitation opening date and time. If you wish to affirmatively claim Resident Vendor status, you should do so by submitting this form with your bid or proposal.

Resident Vendor status may be considered for purposes of resolving tied low bids or the application of a reciprocal preference.

I HEREBY CERTIFY THAT THE COMPANY LISTED BELOW:

1. Is authorized to conduct business in the State of Minnesota on the date a solicitation for a contract is first advertised or announced. *(This includes a foreign corporation duly authorized to engage in business in Minnesota.)*
   ___Yes ___No (must check yes or no)

2. Has paid unemployment taxes or income taxes in the State of Minnesota during the 12 calendar months immediately preceding submission of the bid or proposal for which any preference is sought.
   ___Yes ___No (must check yes or no)

3. Has a business address in the State of Minnesota.
   ___Yes ___No (must check yes or no)

4. Agrees to submit documentation, if requested, as part of the bid or proposal process, to verify compliance with the above statutory requirements.
   ___Yes ___No (must check yes or no)

BY SIGNING BELOW, you are certifying your compliance with the requirements set forth herein and claiming Resident Vendor status in your bid or proposal submission.

Name of Company: _____ Date: _____

Authorized Signature: _____ Telephone: _____

Printed Name: _____ Title: _____

IF YOU ARE CLAIMING RESIDENT VENDOR STATUS, <u>SIGN AND RETURN</u> THIS FORM WITH YOUR BID OR PROPOSAL SUBMISSION.

Attachment E

QUESTIONS AND ANSWERS

What Liferay version is MSRS using? Is it enterprise edition?

Answer: Originally, Liferay 6.1.2 was installed but was not displaying custom development correctly so it was rolled back to version 6.1.1.

Can they provide us access to view the current state of the portal? MSRS says that it is "80% complete" (Page 1). How close is MSRS to meeting browser requirements (Page 2, Vendor Tasks, B.2)?

Answer: We cannot provide access, however we have included the wireframes for the site (see page 2). The site is developed and the text is mostly complete. There are a few features that require assistance from the vendor, including the search box feature, the use of dynamic pages in the FAQ section, and the integration of Java portlet calculators and other web tools. These are on the current MSRS website that is publicly available. Below are examples of the links:

http://www.mndcplan.com/retirement-calculator-intro.html

http://www.mndcplan.com/decision-tree.html

https://mp1.newkirkone.com/MNDCP/Control.aspx

http://www.msrs.state.mn.us/hcsp/index.htmls

Can you give more specifics about what "Google- or comparable search feature" means (Page 2, Vendor Tasks A.2)?

Answer: The out-of-the-box search feature in Liferay is not sufficient and does not generate the most appropriate results. We would prefer to embed something more similar to the search results generated from a "Google" search. We are open to modifying the out-of-the-box search functionality or embedding another search function similar to Google.

Need to understand what "enable archival of old content" means and the features/requirements around this. (Page 2, Vendor Tasks A.7)

Answer: Currently, the site is searching and finding old pages that are no longer applicable. We need assistance to archive and retain old content while ensuring the content does not appear in a search.

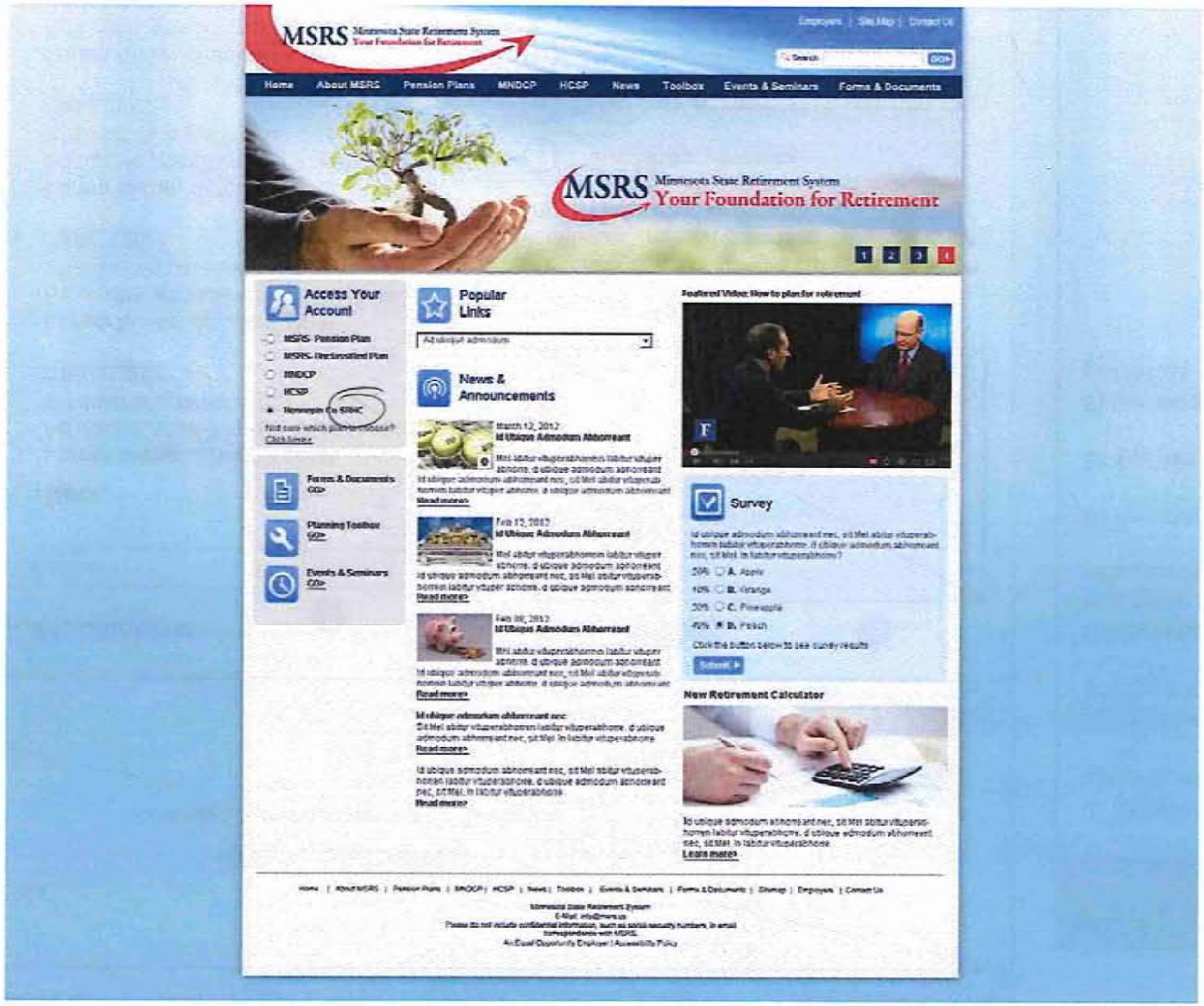
What OS is BD2 v10 running on? What distribution of Linux is MSRS running?

Answer: The database server is currently being migrated to a Pureflex VM with Red Hat Enterprise Linux release 6.4 as the OS with DB2 v 9.7 as the database. This will be complete before the vendor would start work on the project.

MSRS Website Redesign V2.0

Wireframes and Creative Concepts

4-24-2012



Attachment E

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Image slideshow

Promotes 3 main plans + MSRS tagline

A

1 2 3 4

Access Your Account C

- MSRS- Pension Plan
- MSRS- Unclassified Plan
- MNDCP
- HCSP
- Hennepin Co SRHC

Not sure which plan to choose? Click here>

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Forms & Documents>

Planning Toolbox>

Popular Links B

Item #1

News

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Read more>

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In the Spotlight E

Video 1

Survey F

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View results>>

D Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Planning Toolbox | Forms & Documents | Sitemap | Employers | Contact Us

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Page ID:
Page Title: Home Page
Template: TH-1

Page Note

A) J-Query Rotating banner slide show with slide number navigation.

B) Dropdown list featuring top 5-10 most popular links.

C) Radio buttons link to ING-hosted sites, with option to open up a pop-up window to help user select plans.

D) Persistent footer on all pages

E) YouTube Video

F) Survey- Click view results to see current poll results.

Page ID:
Page Title: Home Page_img

Background image 1600 X 1200

Page ID:
Page Title: Home page- slide show

Slide #1: clicking the image will open the **Pension Plans** landing page

Slide #2: clicking the image will open the **MNDCP** landing page

Slide #3: clicking the image will open the **HCSP** landing page

Slide #4: clicking the image will open the **About MSRS** landing page

Page ID:
Page Title: H_RO_P_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

- General Plan
- Correctional Plan
- State Patrol Plan
- Unclassified Plan
- Judges Plan
- Legislators Plan
- Transportation Pilots
- Military Affairs Plan
- Fire Marshals Plan

MSRS Minnesota State Retirement System
Your Foundation for Retirement

1 2 3 4

Access Your Account

- MSRS- Pension Plan
- MSRS- Unclassified Plan
- MNDCP
- HCSP
- Hennepin Co SRHC

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Forms & Documents
GO>

Planning Toolbox
GO>

Events & Seminars

Popular Links

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News & Announcements

March 12, 2012
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Featured Video: How to plan for retirement

Survey

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

A

- General Plan
- Correctional Plan
- State Patrol Plan
- Unclassified Plan
- Judges Plan
- Legislators Plan
- Transportation Pilots
- Military Affairs Plan
- Fire Marshals Plan

Page ID:
Page Title: H_RO_P_plans
Template:

Page Note

A) Drop-down menu

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Pension Plans
MNDCP
HCSP

Page ID:
Page Title: H_RO_Toolbox
Template:

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Page ID:
Page Title: H_RO_Forms_n_docs
Template:

Page Note

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Employers | Site Map | Contact Us

Search

Page ID:
Page Title: About_MSRS
Template: TH-3

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

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About MSRS

-Board of Directors

Meetings

Board Governance

Financial Information

Funding Information

Legislative Updates

Home >> About MSRS

MSRS Banner

About MSRS

As a state employee, you contribute to one of the pension plans administered by the Minnesota State Retirement System (MSRS). Your employer also contributes to the retirement plan on your behalf. Most state employees contribute to the General Employees Retirement Plan. However, MSRS also administers the Correctional Plan, the State Patrol Plan and the Unclassified Plan. If you are not sure which plan you are covered by, please contact your human resource department or MSRS.

All plans provide important retirement, survivor, and disability coverage for state employees. In most cases, you qualify for monthly benefits with three years of service, and reduced benefits can begin as early as age 55 (age 50 for Correctional and State Patrol Plan members)..

Plans Overview

General Plan
The General Employees Retirement Plan (General Plan) is the largest retirement plan administered by MSRS. It covers most state employees, civil service employees of the University of Minnesota, and employees of the Metropolitan Council. Judges, public safety personnel, employees responsible for inmate care, elected officials, and certain unclassified state employees are covered by other plans administered by MSRS.

Correctional Plan
The Correctional Employees Retirement Plan covers correctional officers and other employees in the Departments of Corrections and Human Services who spend at least 75 percent of their employment directly responsible for inmate care. Membership in the plan is mandatory for the qualifying positions. Click here for a list of covered positions.

State Patrol Plan
The State Patrol Retirement Plan covers public safety officers who have the power of arrest from the State Patrol, Department of Natural Resources Enforcement Division, Bureau of Criminal Apprehension, Division of Alcohol and Gambling Enforcement, and the Fugitive

Page Note

Page ID:
Page Title: About_MSRS_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

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- About MSRS
- Board of Directors
  - Meetings
  - Board Governance
- Financial Information
- Funding Information
- Legislative Updates

Home >>About MSRS

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Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents | Sitemap | Employers | Contact Us

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

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Page Title: About_Board
Template: TP-1

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About MSRS

-Board of Directors

Meetings

Board Governance

Financial Information

Funding Information

Legislative Updates

Home >> About MSRS >>Board of Directors

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Mary Benner, Chair
Mathew Hodapp, Vice-Chair
John Richter
Vacant
Commissioner Jim Schowalter
Sally (R.W.) Olsen
Michelle R. Sommers
Allen E. Hoppe
Steven Amic
Chester Jorgenson
Thomas Ruter

Contact information for any one of the above board members:

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60 Empire Drive, Suite 300
St. Paul, MN 55103-3000

E-Mail: info@msrs.us
Telephone: (651) 296-2761
Toll Free: (800) 657-5757
Fax: (651) 297-5238

Administrative Staff & Professional Consultants
Name #1
Name #2
Name #3

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Pension Plans

- General Plan
- Correctional Plan
- State Patrol Plan
- Unclassified Plan
- Judges Plan
- Legislators Plan
- Transportation Pilots
- Military Affairs Plan
- Fire Marshals Plan

Home >> Pension Plans

Pension Plans Collage

Pension Plans

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Pick a plan on the left menu to learn more.

Page ID:
Page Title: Pension Plans
Template: TH-3

Page Note

Page ID:
Page Title: P_GP
Template: TP-1

Expand All + Collapse All -

-General Plan
- Plan Handbook
- Prepare to Retire
- Eligibility

-Benefit Calculation
- Level Formula
- Step Formula
- High-Five Average Salary

Disability Benefit

Combined Service

Beneficiary and Survivor Benefits

-Life Changes
- Address Changes
- Divorce
- Notification of Death

-Apply for Retirement
- Pre-Retirement Checklist
- Survivor Options
- Direct Deposit

-After Retirement
- Tax Information
- Post Retirement Increases
- Re-Employment

Refunds/Rollover

Forms & Documents

FAQs

General Plan

The General Employees Retirement Plan (General Plan) is the largest retirement plan administered by MSRS. It covers most state employees, civil service employees of the University of Minnesota, and employees of the Metropolitan Council. Judges, public safety personnel, employees responsible for inmate care, elected officials, and certain unclassified state employees are covered by other plans administered by MSRS.

Membership in the General Plan is mandatory.

Both the employee and employer contribute 5% of the employee's gross salary to the reirement plan.

Employees covered by the General Plan also contribute to Social Security. Monthly benefits from the plan are paid in addition to Social Security benefits.

Page Note

Page ID:
Page Title: Pension_plans_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Pension Plans
- General Plan
- Correctional Plan
- State Patrol Plan
- Unclassified Plan
- Judges Plan
- Legislators Plan
- Transportation Pilots
- Military Affairs Plan
- Fire Marshals Plan

Home >>Pension Plans

Pension Plans

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Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents | Sitemap | Employers | Contact Us

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-General Plan
- Plan Handbook
- Prepare to Retire
- Eligibility

-Benefit Calculation
- Level Formula
- Step Formula
- High-Five Average Salary

Disability Benefit

Combined Service

Beneficiary and Survivor Benefits

-Life Changes
- Address Changes
- Divorce
- Notification of Death

-Apply for Retirement
- Pre-Retirement Checklist
- Survivor Options
- Direct Deposit

-After Retirement
- Tax Information
- Post Retirement Increases
- Re-Employment

Refunds/Rollover

Forms & Documents

FAQs

Benefit Calculation

A disability benefit is computed the same way as a retirement benefit; however, no early retirement reduction is applied because of younger age. For example, if you had ten years of service, you would be eligible for 17 percent of your high-five average salary.

Example

High-five average salary	$ 36,000 ($3,000 per month)
Years of service	20 years
Age at disability	45 years
$3,000	Monthly average salary
x 34 %	20 years of service at 1.7%
$1,020	Monthly Disability Benefit

How your MSRS benefit may impact benefits payable from Workers' Compensation
If you qualify for MSRS disability and receive Workers' Compensation because of your disability, your Workers' Compensation benefit likely will be reduced by the amount of the disability benefits payable from MSRS. MSRS will pay your entire disability amount, and Workers' Compensation likely will apply the reduction.

How your MSRS benefit may impact benefits payable from your Long-Term disability insurance plan
If you purchase an optional Long-Term Disability plan, the amount you are paid from MSRS may reduce the amount you are paid from your disability plan. Any amounts received from Social Security may also lower payments from your Long-Term Disability plan. For more information regarding your Long-Term Disability plan, state employees may contact Ochs, Inc., at (651) 665-3789 or (800) 392-7295.

If you would like an estimate of your MSRS disability benefit, please contact MSRS.

Page ID:
Page Title: P_GP_benefit_calc
Template: TP-1

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All + Collapse All -

-General Plan
- Plan Handbook
- Prepare to Retire
- Eligibility

-Benefit Calculation
- Level Formula
- Step Formula
- High-Five Average Salary

Disability Benefit

Combined Service

Beneficiary and Survivor Benefits

-Life Changes
- Address Changes
- Divorce
- Notification of Death

-Apply for Retirement
- Pre-Retirement Checklist
- Survivor Options
- Direct Deposit

-After Retirement
- Tax Information
- Post Retirement Increases
- Re-Employment

Refunds/Rollover

Forms & Documents

FAQs

Home >> Pension Plans >>General Plan >>Eligibility

Eligibility

For those hired on or after July 1, 1989:

You are eligible for monthly benefits (or what we call vested),
after three or more years of service, if you were hired before July 1, 2010
after five years of service, if you were first hired on or after July 1, 2010
You can start collecting full retirement benefits when you are age 66. Most employees can begin collecting a reduced monthly benefit at age 55 or later.

For those hired before July 1, 1989:
You can retire with full retirement benefits at age 65. You can also qualify for full retirement benefits if your age and years of service total 90 or more, which would make you eligible for the Rule of 90. For example, if you are age 60 with 30 years of service, you qualify for the Rule of 90.

Most employees can begin collecting a reduced monthly benefit at age 55 or later. Some employees who were first hired before July 1, 1989, can retire at any age with 30 or more years of service.

Page ID:
Page Title: P_GP_eligibility
Template: TP-1

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All + Collapse All -

-General Plan
- Plan Handbook
- Prepare to Retire
- Eligibility

-Benefit Calculation
- Level Formula
- Step Formula
- High-Five Average Salary

Disability Benefit

Combined Service

Beneficiary and Survivor Benefits

-Life Changes
- Address Changes
- Divorce
- Notification of Death

-Apply for Retirement
- Pre-Retirement Checklist
- Survivor Options
- Direct Deposit

-After Retirement
- Tax Information
- Post Retirement Increases
- Re-Employment

Refunds/Rollover

Forms & Documents

FAQs

Home >> Pension Plans >>General Plan >>FAQs

FAQs

Frequently Asked Questions
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Category #1

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Category #3

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Page ID:
Page Title: FAQs
Template: TQ-1

Page Note

A) Q&A is collapsible. Only one answer is shown at any one time.

Page ID:
Page Title: FAQs_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All Collapse All

- General Plan
  - Plan Handbook
  - Prepare to Retire
  - Eligibility
- Benefit Calculation
  - Level Formula
  - Step Formula
  - High-Five Average Salary
- Disability Benefit
- Combined Service
- Beneficiary and Survivor Benefits
- Life Changes
  - Address Changes
  - Divorce
  - Notification of Death
- Apply for Retirement
  - Pre-Retirement Checklist
  - Survivor Options
  - Direct Deposit
- After Retirement
  - Tax Information
  - Post Retirement Increases
  - Re-Employment
- Refunds/Rollover
- Forms & Documents
- FAQs

Home >>Pension Plans >> General Plan >> FAQs

FAQs

Frequently Asked Questions
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Category #1
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Category #3
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Q: Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed?
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Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents | Sitemap | Employers | Contact Us

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Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All + Collapse All -

-Unclassified Plan
- Plan Handbook
- Prepare to Retire
- Eligibility

-Benefit Calculation

-Converting to General Plan
- Level Formula
- Step Formula
- High-Five Average Salary

Investment Options

Disability Benefit

Combined Service

Beneficiary and Survivor Benefits

-Life Changes
- Address Changes
- Divorce
- Notification of Death

-Apply for Retirement
- Pre-Retirement Checklist
- Survivor Options
- Direct Deposit

-After Retirement
- Tax Information
- Post Retirement Increases
- Re-Employment

Refunds/Rollover

Forms & Documents

FAQs

Home >> Unclassified Plan

Unclassified Plans

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Page ID:
Page Title: P_unclassified
Template: TP-1

Page Note

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All + Collapse All -

MNDCP

-About MNDCP
- Fee Disclosure
- Plan Document

-Enrollment
- Eligibility
- How much should I save?
- Pre Tax or Roth After Tax?
- Contribution Rates

-Investments
- Investment Options
- How to choose?
- Investor Profile Quiz
- Performance Report
- Benchmark Indexes
- Self-Directed Brokerage Account
- Personal online Advisor Service
- Professional Account Management Service

-Life Changes
- Address Changes
- Divorce
- Notification of Death

-Retirement Planning
- Withdrawal Eligibility
- How long will my savings last?

-Payout Options
- Taxes
- Direct Deposit
- Required Minimum Distributions
- Annuity Options

Forms & Documents

FAQs

Home >> MNDCP

MNDCP Banner

Access Your Account GO

News

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In the Spotlight

Video 1

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Optional Image

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Page Title: MNDCP
Template: TH-2

Page Note

Page ID:
Page Title: MNDCP_img

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Employers | Site Map | Contact Us

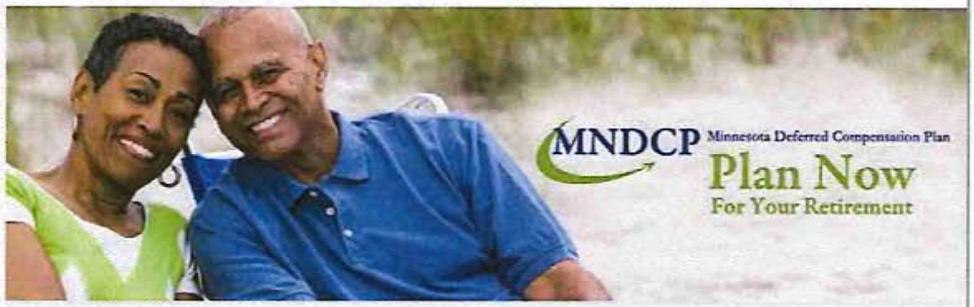
Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All Collapse All

Home >>MNDCP

MNDCP
- About MNDCP
  - Fee Disclosure
  - Plan Document
- Enrollment
  - Eligibility
  - How much should I save?
  - Pre Tax or Roth After Tax?
  - Contribution Rates
- Investments
  - Investment Options
  - How to choose?
  - Investor Profile Quiz
  - Performance Report
  - Benchmark Indexes
  - Self-Directed Brokerage Account
  - Personal online Advisor Service
  - Professional Account Management Service
- Life Changes
  - Address Changes
  - Divorce
  - Notification of Death
- Retirement Planning
  - Withdrawal Eligibility
  - How long will my savings last?
- Payout Options
  - Taxes
  - Direct Deposit
  - Required Minimum Distributions
  - Annuity Options
- Forms & Documents
- FAQs



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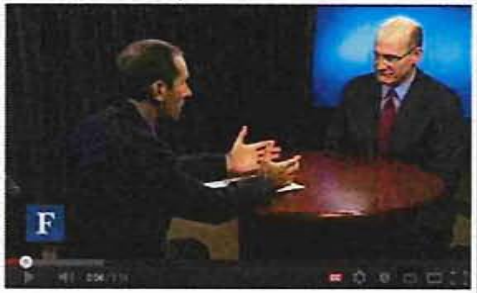

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Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

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MNDCP

-About MNDCP

- Fee Disclosure
- Plan Document

-Enrollment

- Eligibility
- How much should I save?
- Pre Tax or Roth After Tax?
- Contribution Rates

-Investments

- Investment Options
- How to choose?
- Investor Profile Quiz
- Performance Report
- Benchmark Indexes
- Self-Directed Brokerage Account
- Personal online Advisor Service
- Professional Account Management Service

-Life Changes

- Address Changes
- Divorce
- Notification of Death

-Retirement Planning

- Withdrawal Eligibility
- How long will my savings last?

-Payout Options

- Taxes
- Direct Deposit
- Required Minimum Distributions
- Annuity Options

Forms & Documents

FAQs

Home >> MNDCP >>Divorce

Divorce

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Page ID:
Page Title: MNDCP_divorce
Template: TP-1

Page Note

Page ID:
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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All Collapse All

Home >> MNDCP >> Divorce

MNDCP
- About MNDCP
  - Fee Disclosure
  - Plan Document
- Enrollment
  - Eligibility
  - How much should I save?
  - Pre Tax or Roth After Tax?
  - Contribution Rates
- Investments
  - Investment Options
  - How to choose?
  - Investor Profile Quiz
  - Performance Report
  - Benchmark Indexes
  - Self-Directed Brokerage Account
  - Personal online Advisor Service
  - Professional Account Management Service
- Life Changes
  - Address Changes
  - Divorce
  - Notification of Death
- Retirement Planning
  - Withdrawal Eligibility
  - How long will my savings last?
- Payout Options
  - Taxes
  - Direct Deposit
  - Required Minimum Distributions
  - Annuity Options
- Forms & Documents
- FAQs

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HCSP

-About HCSP

HCSP Brochure

Plan Document

-Participation

Eligibility

Contributions

Waivers

Investment Options

When can I use my account?

-What is reimbursable?

Eligible Expenses

Dual-Use Items

-How do I get reimbursed?

Documentation

Payment Types & Timing

Payment Changes

Direct Deposits

HCSP/HSA Compatibility

Returning to Work

Beneficiary & Survivor Benefits

-Life Changes

Address Changes

Divorce

Notification of Death

NewsletterForms & Documents

FAQ

Home >> HCSP

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Page ID:
Page Title: HCSP
Template: TH-2

Page Note

Page ID:
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Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All Collapse All

- HCSP
- About HCSP
  - HCSP Brochure
  - Plan Document
- Participation
  - Eligibility
  - Contributions
  - Waivers
- Investments Options
- When Can I Use My Accounts?
- What is Reimbursable?
  - Eligible Expenses
  - Dual-Use Items
- How do I get reimbursed?
  - Documentation
  - Payment Types & Timing
  - Payment Changes
  - Direct Deposits
- HCSP/HSA Compatibility
- Returning to Work
- Beneficiary & Survivor Benefits
- Life Changes
  - Address Changes
  - Divorce
  - Notification of Death
- Forms & Documents
- FAQs

Home >>HCSP

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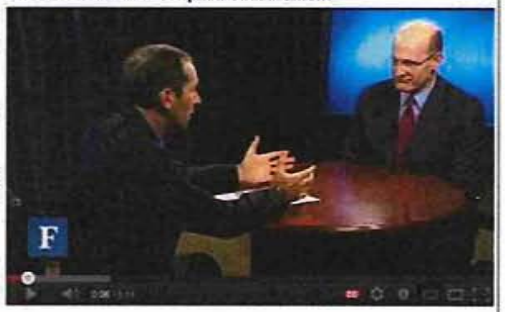

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Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: HCSP_about
Template: TP-1

Expand All + Collapse All -

HCSP
-About HCSP
HCSP Brochure
Plan Document
-Participation
Eligibility
Contributions
Waivers
Investment Options
When can I use my account?
-What is reimbursable?
Eligible Expenses
Dual-Use Items
-How do I get reimbursed?
Documentation
Payment Types & Timing
Payment Changes
Direct Deposits
HCSP/HSA Compatibility
Returning to Work
Beneficiary & Survivor Benefits
-Life Changes
Address Changes
Divorce
Notification of Death
NewsletterForms & Documents
FAQ

Home >> HCSP About HCSP

About HCSP

What is the Health Care Savings Plan?
The Health Care Savings Plan (HCSP) is an employer-sponsored program that allows employees to save money, tax-free, to use upon termination of employment to pay for eligible health care expenses for you, your spouse and legal tax dependents, and your children up to their 26th birthday regardless of their marital status, status as a full-time student, or place of residence.

Employees will be able to choose among seven different investment options provided by the State Board of Investment. HCSP is a tax-free account which means contributions and eligible reimbursements are not reportable on state or federal income tax returns.

What legal authority exists to offer the Health Care Savings Plan?
Laws of Minnesota 2001, Chapter 352.98, authorizes Minnesota State Retirement System (MSRS) to offer this program to state employees, as well as all other governmental subdivisions.

MSRS received its private letter ruling establishing the HCSP as a tax exempt benefit on July 29, 2002.

Who chooses how contributions will be made to the Health Care Savings Plan?
Employees covered by a bargaining unit:
Amounts to be put into the account must be negotiated or agreed to by both the bargaining unit and employer and written into the collective bargaining agreement or Memorandum of Understanding (MOU).

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: News
Template: TN-1

News

Current News 2012

2011

2010

2009

Newsletters

MSRS Messenger

MNDCP Chronicle

HCSP Advisor

Home >> News

News

Current News 2012

<Previous 1 2 3 4 Next>

March 12, 2012
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The Minnesota State Retirement System (MSRS) pension plans' funding levels show improvement over the previous year's levels. Two factors contributed to the...
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Feb 22, 2012
2012 Legislative Session Begins
The 2012 Legislative Session is underway. The MSRS Board is not recommending any substantive changes to retirement benefits. Ad ubique admodum abhorreant nec...
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<Previous 1 2 3 4 Next>

Page Note

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Page ID:
Page Title: News_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

News
Current News 2012
2011
2010
2009
Newsletters
MSRS Messenger
MNDCP Chronicle
HCSP Advisor

Home >> News

< Previous 1 2 3 4 Next >

News
Current News 2012

March 12, 2012
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< Previous 1 2 3 4 Next >

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Page ID:
Page Title: News_indvl
Template: TP-2

Page Note

March 12, 2012

Funding Status Improves

The Minnesota State Retirement System (MSRS) pension plans' funding levels show improvement over the previous year's levels. Two factors contributed to the improvement:

- The 2010 Legislature adopted legislation proposed by MSRS to lower future liabilities (thereby, lowering our expenses); and
- A strong investment return of 23.3 percent as of June 30, 2011, along with the previous year's 15.8 percent return, has moved the funding levels of our four largest retirement plans in the right direction.

Funding Change 2010 to 2011

	July 1, 2010 (Market Value)	July 1, 2011 (Market Value)
General Employees Retirement Plan	75.0%	87.0%
Correctional Plan	61.7%	71.3%
State Patrol Plan	71.5%	81.1%
Judges Plan	52.5%	59.7%

We will continue to monitor our financial situation and take proactive actions, if needed, to bring the pension plans administered by MSRS closer to full funding.

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: News_MSRS_Messenger
Template: TP-1

News

Current News 2012

2011

2010

2009

Newsletters

MSRS Messenger

MNDCP Chronicle

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Home >> News >>MSRS Messenger

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2010 Winter Messenger

2011 Winter Messenger

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Page Note

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

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- Pension Plans
- MNDCP
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Home >> Toolbox

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Page Title: Toolbox
Template: TP-1

Page Note

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Toolbox

Pension Plans

MNDCP

HCSP

Home >> Toolbox >>MNDCP

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Enrollment

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Investments

Sjkfdaljkfh 1

Sjkfdaljkfh 2

Sjkfdaljkfh 3

Sjkfdaljkfh 4

Sjkfdaljkfh 5

Withdrawals

Sjkfdaljkfh 1

Sjkfdaljkfh 2

Sjkfdaljkfh 3

Sjkfdaljkfh 4

Pretax vs. After Tax

Sjkfdaljkfh 1

Sjkfdaljkfh 2

Sjkfdaljkfh 3

Sjkfdaljkfh 4

Sjkfdaljkfh 5

Sjkfdaljkfh 6

Page ID:
Page Title: Toolkit_MNDCP
Template: TF-1

Page Note

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1) Java calculators- to be moved to this site, embed on new pop-up windows

2) PDF docs- pop-up windows

3) Undetermined interactive apps- pop-up windows

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Home >> Events & Seminars

Events & Seminars

Summary Day Week Month Year Events

Wednesday

11

4/11/12

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
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Time	Title	Type	
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Page Title: Event_n_seminars
Template: TE-1

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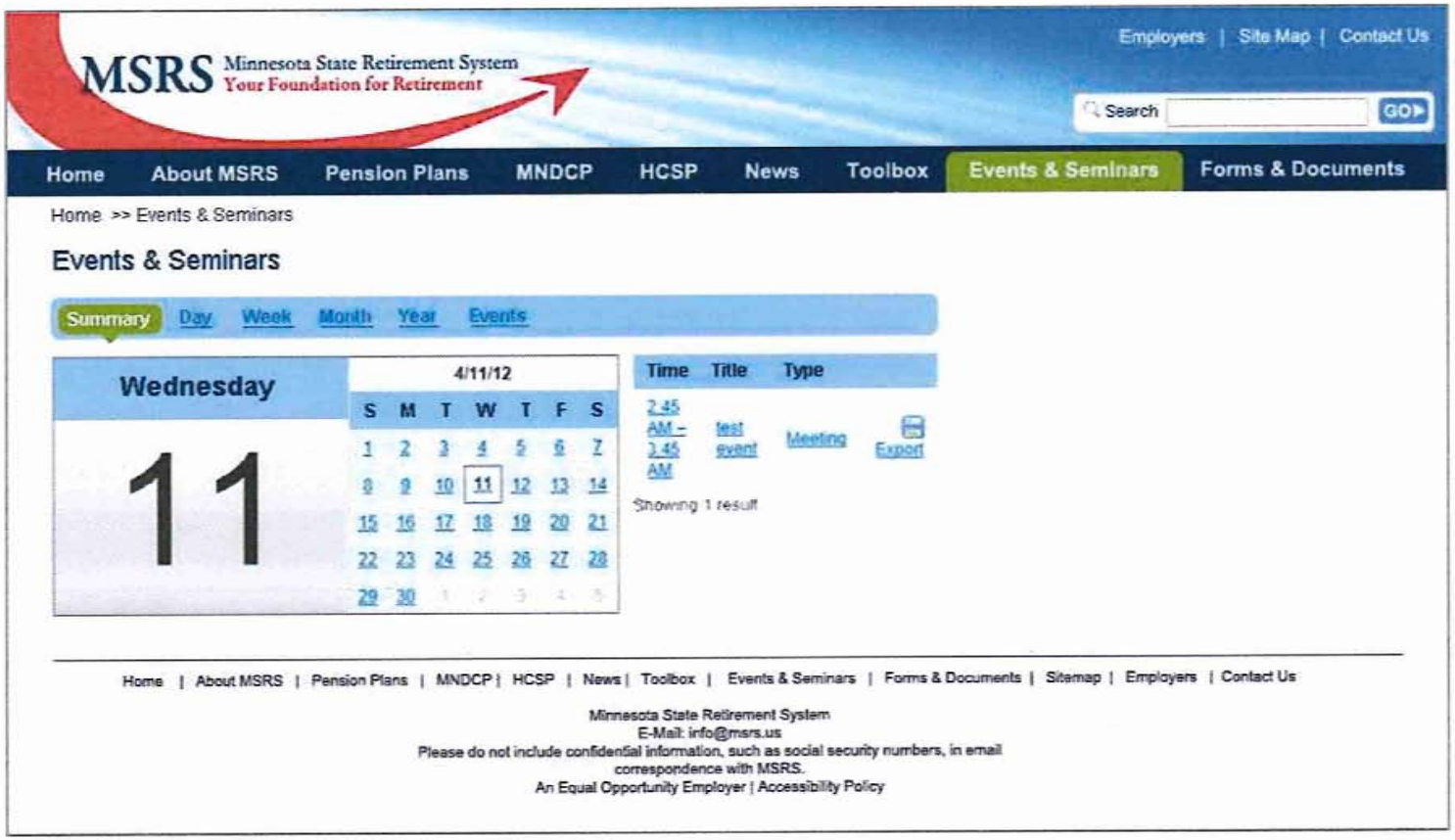
TE-1



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Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: Forms
Template: TP-1

Forms & Documents
Pension Plans
MNDCP
HCSP
Divorce
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Home >> Forms & Documents

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Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: Forms_pension_p
Template: TF-1

Forms & Documents
- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Home >> Forms & Documents >>Pension Plans

Pension Plans

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Forms

Beneficiary Designation / Spousal Waiver

Sjkfdaljkfh 1
Sjkfdaljkfh 2
Sjkfdaljkfh 3

Direct Deposit

Personal Info Change

Retirement Applications

Sjkfdaljkfh 1
Sjkfdaljkfh 2
Sjkfdaljkfh 3
Sjkfdaljkfh 4
Sjkfdaljkfh 5
Sjkfdaljkfh 6

Tax Withholding (W-4P)

Unclassified Plan

Sjkfdaljkfh 1
Sjkfdaljkfh 2
Sjkfdaljkfh 3
Sjkfdaljkfh 4
Sjkfdaljkfh 5
Sjkfdaljkfh 6

Documents

1099-R Explained

How to apply for Retirement

Plan Hand Books

Sjkfdaljkfh 1
Sjkfdaljkfh 2
Sjkfdaljkfh 3
Sjkfdaljkfh 4
Sjkfdaljkfh 5

Tax Information

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: Forms_MNDCP
Template: TF-1

Forms & Documents

- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Home >> Forms & Documents >>MNDCP

MNDCP

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Forms

Beneficiary Designation

Direct Deposit Agreement

Enrollment

Incoming Direct Rollover

Personal Information Change

TD AMERITRADE Enrollment

Documents

Brochures

Beneficiary Guide

Inheriting From A Spouse

Inheriting From A Non-Spouse

Plan Now

Retirement Guide

Roth 457(b)

Pamphlets

Annuity

TD AMERITRADE Brokerage Account

Others

Contribution Change Notice

How Much Should I Save Worksheet

Investment Option Performance Report

Plan Document

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: Forms_HCSP
Template: TF-1

Forms & Documents
- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Home >> Forms & Documents >>HCSP

HCSP

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Forms

Beneficiary Designation

Direct Deposit Agreement

Personal Information Change

Reimbursement Request

Reimbursement Suspension Election 2012

Documents

Beneficiary Guide

Eligible Medical Expenses

HCSP at a Glance Brochure

HCSP Plan Document

Investment Options

Investment Performance

Annual Notice 2012 (Affordable Care Act)

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: Forms_divorce
Template: TF-1

Forms & Documents

- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Home >> Forms & Documents >>Divorce

Divorce

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Forms

Beneficiary Designation

HCSP

MNDCP

Beneficiary Designation (Pension Plans)

State Patrol, Judges, Legislators & Elected Officials

General, Correctional, & Unclassified

Pilots, Military Affairs, & Fire Marshals

Other

Personal Information Change

Pamphlets

Documents

Brochures

Beneficiary Guide

Divorce Information

HCSP

MNDCP

Pension Plan

Domestic Relations Order Sample Language

HCSP

MNDCP

Pension Plans

Unclassified Plan

Divorce after Retirement

Revocation of Survivor Sample Language

Page Note

MSRS LOGO

Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Page ID:
Page Title: Forms_disability
Template: TF-1

Forms & Documents
- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Home >> Forms & Documents >>MSRS Disability

MSRS Disability

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Forms

General Plan

Application
Beneficiary Designation
Employer Certification
Physicians Statement

Correctional Plan

Application
Beneficiary Designation
Employer Certification
Physicians Statement

State Patrol Plan

Application
Beneficiary Designation
Employer Certification
Physicians Statement

Other

Direct Deposit Agreement
Tax Withholding – Form W-4P

Documents

Disability Process & Benefit

General Plan
Correctional Plan
State Patrol

Page Note

Page ID:
Page Title: Forms_disability_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Forms & Documents
- Pension Plans
- MNDCP
- HCSP
- Divorce
- MSRS Disability

Home >> Forms & Documents >> MSRS Disability

MSRS Disability

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Forms

General Plan
- Application
- Beneficiary Designation
- Employer Certification
- Physicians Statement

Correctional Plan
- Application
- Beneficiary Designation
- Employer Certification
- Physicians Statement

State Patrol Plan
- Application
- Beneficiary Designation
- Employer Certification
- Physicians Statement

Other
- Direct Deposit Agreement
- Tax Withholding – Form W-4P

Documents

Disability Process & Benefit
- General Plan
- Correctional Plan
- State Patrol

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents | Sitemap | Employers | Contact Us

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Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All + Collapse All -

-Employers

Find a Representative

-MNDCP

General Info

Enrollment

A Forms & Documents

Newsletters

Governing laws & Documents

Roth 457

-HCSP

General Info

Enrollment

Contract Language

Forms & Documents

Newsletters

Advisory Meetings

Governing laws & Documents

HCSP/HSA Compatibility

Eligible Medical Expenses

MSRS Pension Eligibility

Payroll Submission Process

Home >> Employers

Employers image

Payroll Administrators Login GO

Welcome to the Minnesota State Retirement System (MSRS) employer website. MSRS administers the State of Minnesota employee pension plans as well as the Minnesota Deferred Compensation Plan (MNDCP), Health Care Savings Plan (HCSP) and Hennepin County 1% Supplemental Plan.
If you are a State, local government or school district employer in Minnesota and participate (or are eligible to participate) in any pension plans offered by a public employer in the State of Minnesota, this website offers valuable plan information and payroll submission training resources for employers, payroll contacts and human resource representatives.

News

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Popular Links

Item #1

In the Spotlight

Video 1

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Optional Image

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Page ID:
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Template: TH-2

Page Note

A) Menu items with lock icons requires login to access. When clicked, user is sent to a login screen.

Page ID:
Page Title: Employers_img

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Employers | Site Map | Contact Us

Search GO

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

Expand All Collapse All

- Employers
  - Find a Representative
- MNDCP
  - General Info
  - Enrollment
  - Forms & Documents
  - Newsletters
  - Governing laws & Documents
  - Roth 457
- HCSP
  - General Info
  - Enrollment
  - Contract Language
  - Forms & Documents
  - Newsletters
  - Advisory Meetings
  - Governing laws & Documents
  - HCSP/HSA Compatibility
  - Eligible Medical Expenses
- MSRS Pension Eligibility
- Payroll Submission Process

Home >>HCSP

Payroll Administrator Login GO

News & Announcements

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Feb 08, 2012
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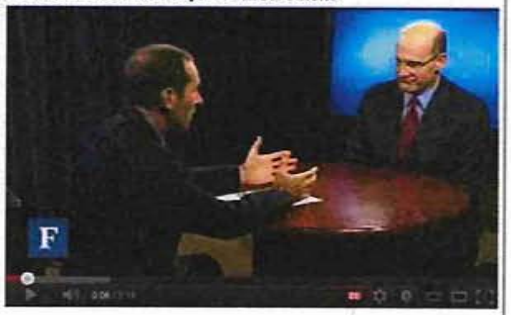
Featured Video: How to plan for retirement



New Retirement Calculator

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Employers | Site Map | Contact Us

Search

Home | About MSRS | Pension Plans | MNDCP | HCSP | News | Toolbox | Events & Seminars | Forms & Documents

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- Detroit Lakes
- Duluth
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- St. Cloud

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St. Paul Office

(Main Location)

Office hours are 8:00 a.m. - 4:30 p.m., Monday through Friday

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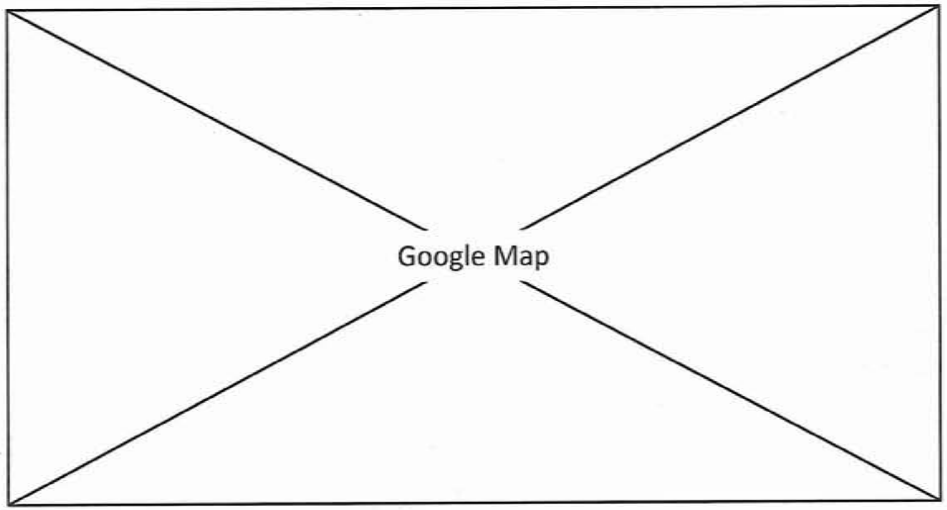

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Template: TP-1

Page Note