

Mercer Vendor Intelligence Portal (MercerVIP)

Overview & Training

November 2024

A business of Marsh McLennan



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MercerVIP Overview

1

MercerVIP[®]

The problem we are trying to solve?

The H&B vendor landscape is rapidly evolving with frequent new entrants, acquisitions, and departures. Mercer's previous system of cataloguing vendors cannot keep up with the rate of change – leading to frustration.

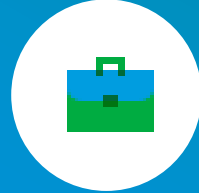
MercerVIP is a vendor maintained database to ensure consultants are getting the most up to date and accurate information about vendors at any given time.



This clamshell is illustrative of an overwhelming and ever-changing health and benefits vendor marketplace. It is not intended to be a comprehensive list of all available H&B vendors and point solutions. Mercer Consultants use MercerVIP for vendor research.

MercerVIP

is a **digitized** vendor platform with dynamic searching that **simplifies** the previous fragmented distribution of vendor information to Mercer Consultants



Product Profiles

Maintained by vendors

Vendors have control to input and update product information at any time. Product enhancements and updates can be shown to all Mercer consultants in one place.



Streamlined RFX Capabilities

RFP/RFI capabilities integrated in the platform provide a fast and efficient standardized process to save vendors time and energy vs. responding to multiple similar Mercer requests.

MercerVIP

748 Products

Explore solutions

Search by category, product, or vendor name...



Trending

Quicksearch



Employee Discounts /
Discount Cards

In Rewards, Perks Platforms, and Conci...



ACA Measuring & Tracking

In ACA Compliance Services



Cardiovascular Ongoing
Management

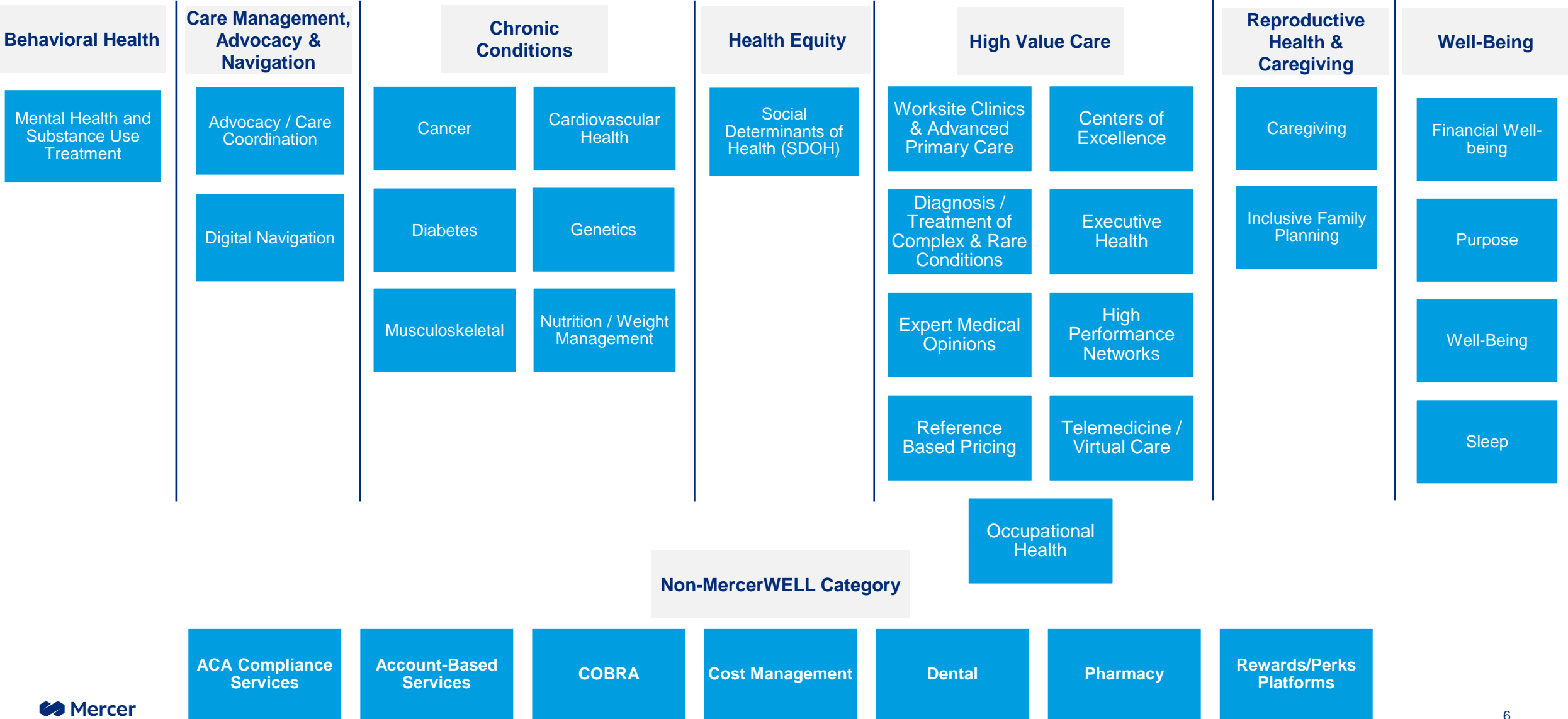
In Cardiovascular Health

MercerVIP improves the quality, quantity, and consistency of the vendor information you have access to, in one place.

MercerVIP

Product Categories by Vertical

The [MercerVIP Category Solution Overview](#) includes descriptions of all the categories and subcategories.



MercerVIP

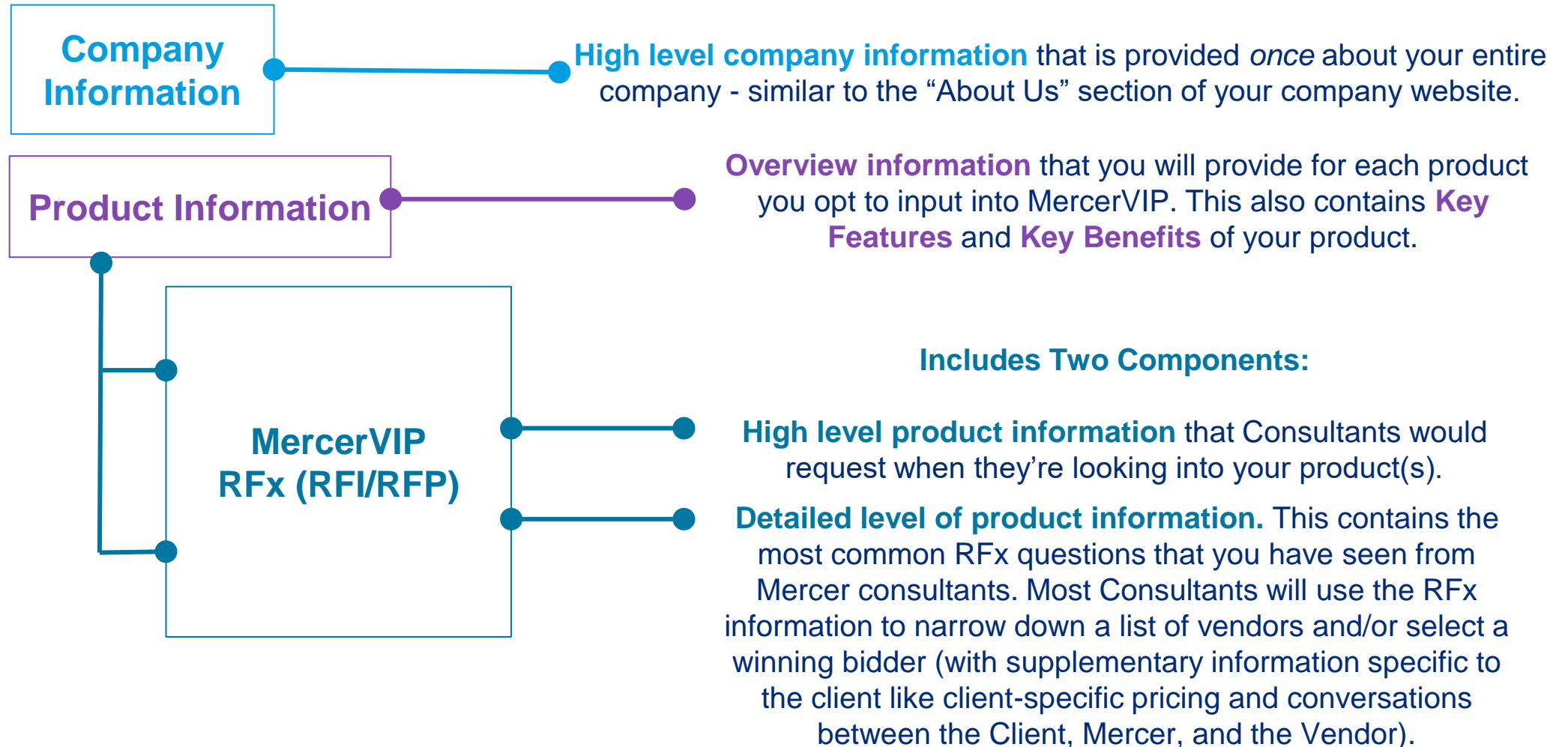
Product Information

MercerVIP contains questions in the below topic areas

AI / Gen AI	Clinical Information (If applicable)	Communications	Company Overview and Information	Compliance & Data Security
Contact Information	Customer Service	Diversity, Equity and Inclusion	Implementation & Integration	Market-Space Specific Capabilities (e.g., Diabetes, Well- Being, etc.)
Results & Outcomes	Solution Cost	Solution Overview and Information	Target Employer Business Detail	Transparency (If applicable)
	User Experience	Vendor Client Experience	More to come!	

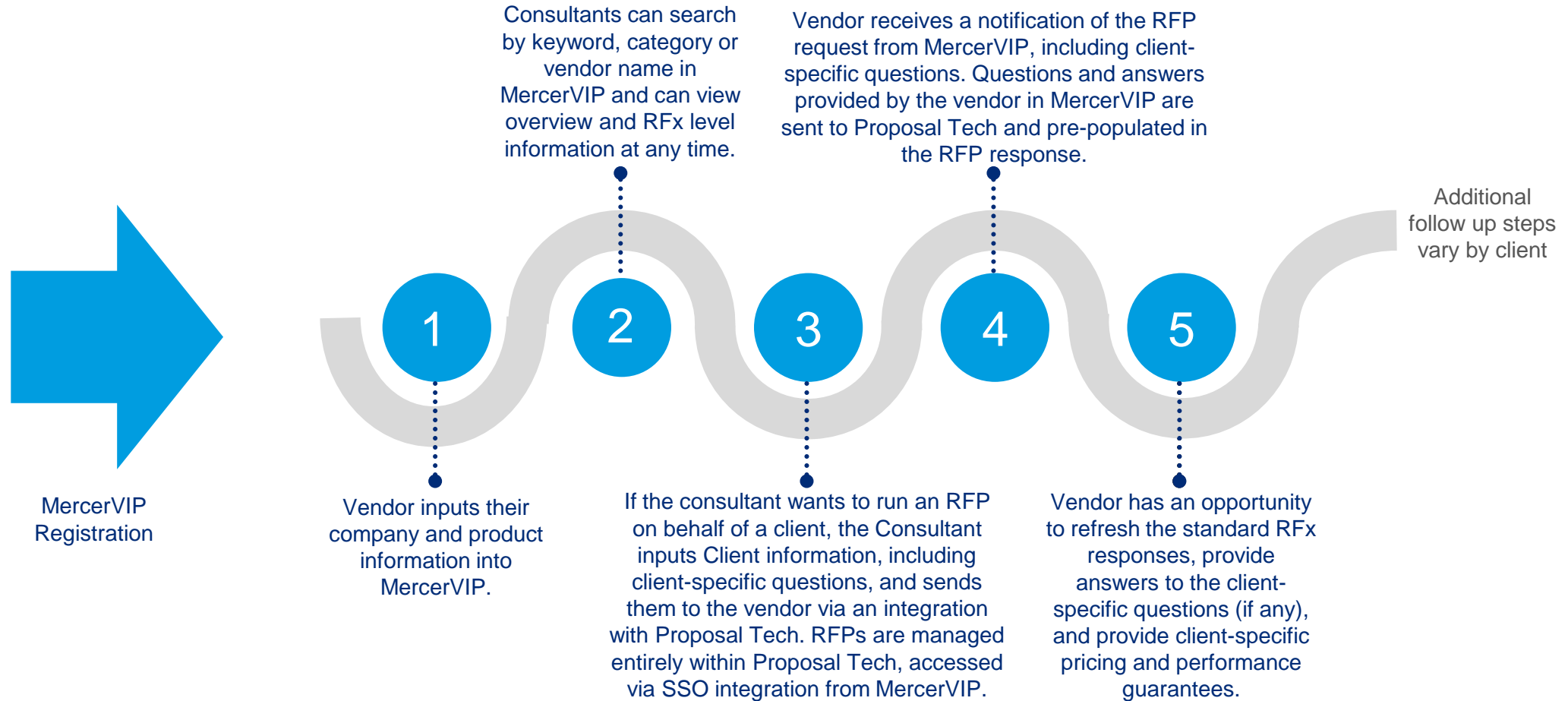
MercerVIP

Data Structure



MercerVIP

Vendor User Experience



Conversations between Mercer, Mercer's Client, and/or Vendor may happen at any point in the process.

MercerVIP

Cost of the Solution



Accepting [MercerVIP Terms & Conditions](#) is required to register.

Data & Analytics such as:

- Interaction Analysis
- RFP Insights
- Events

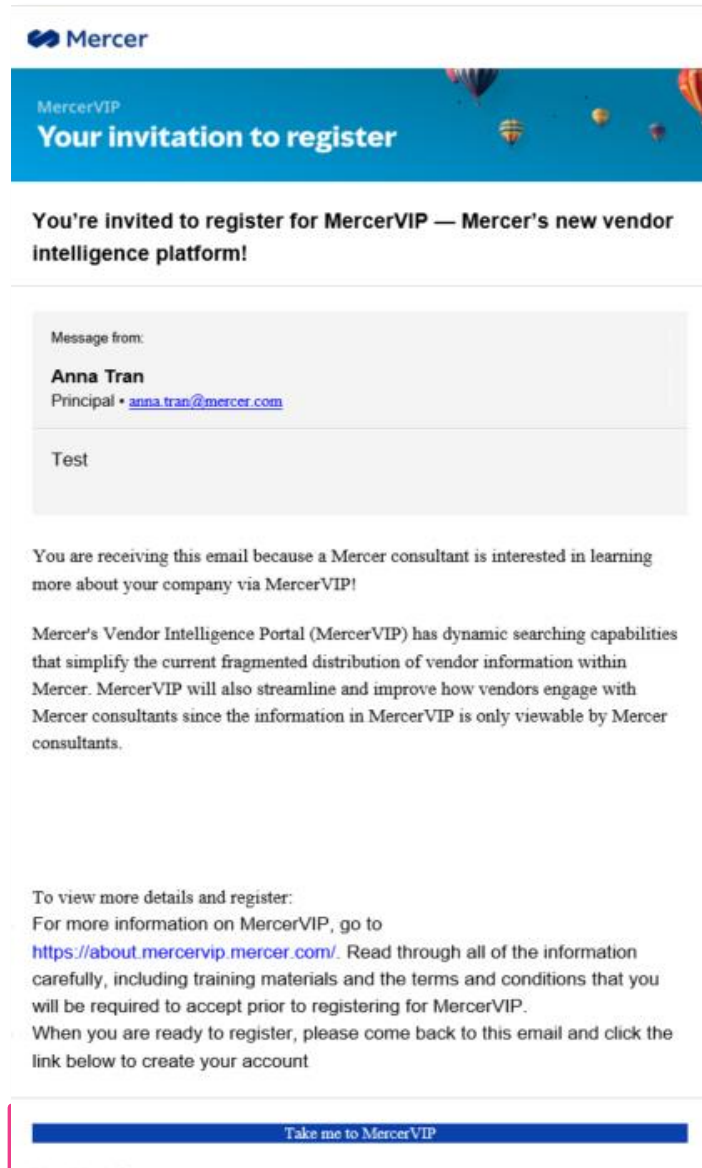
Additional Mercer Services including dedicated time with Mercer Consultants for feedback. Please see [MercerVIP Premium Services](#) for more details.

Vendor Registration and Login

2

MercerVIP

Vendor Sign-Up



In order to create a user account, you must first receive an email invitation with a unique link to register.

To receive an invitation, email mercervip@mercer.com with your company name, your name, and email address.

MercerVIP utilizes Mercer's standard login protocol. If you already have an account with another Mercer application, you may already be registered. If that is the case, you will be directed to login with your email and password instead of creating a new password. If you forgot your password, there is a forgot your password process you can follow.

If you don't already have a Mercer account, after clicking on **Take me to MercerVIP** link, you will be asked to enter your name and set your password.

MercerVIP

First-Time Login

1. Input your **First Name** and **Last Name**
2. Select the country you're located
3. Choose your preferred language
4. Create and confirm your password to MercerVIP
5. Confirm your email and login to your account (Sent in a separate email)

Note: If you attempt to login without confirming your account, you'll get an "Account disabled" warning. Ensure you click Confirm Account in the confirmation email

Mercer VIP

Create An Account

Let's create your account in a few easy steps. Can you enter your full name?

Type your first name
First Name*

Type your last name
Last Name*

Cancel Continue

Create An Account

Please select the country where you are located.

Country*
Type or Select Country Type or Select Country

Create An Account

What is your preferred language?

Language*
Select a Language

Mercer VIP

Create An Account

Let's create a password. It must be at least eight (8) characters, include at least one numeric (0-9) character, and one punctuation mark, symbol, or alternate case (upper/lower).

Enter a password
Password*

Confirm your password
Confirm Password*

Cancel Continue

In order to complete the creation of your account, please click the link below to confirm your email address, and complete your registration:

[Confirm your email](#) **Click Here**

If clicking the link doesn't work, please copy and paste the link below into a new web browser window instead:

<https://main.mercervip.euwt1.dev.ext.mercer.com/mssso/registration/verify?VerificationID=85f6b228-e853-4d50-b058-dc68f0071ca0&locale=en-US>

For your security, the link is valid for the next 48 hours. Please reach out to mercervip@mercer.com for general questions.

MercerVIP Team

Create An Account

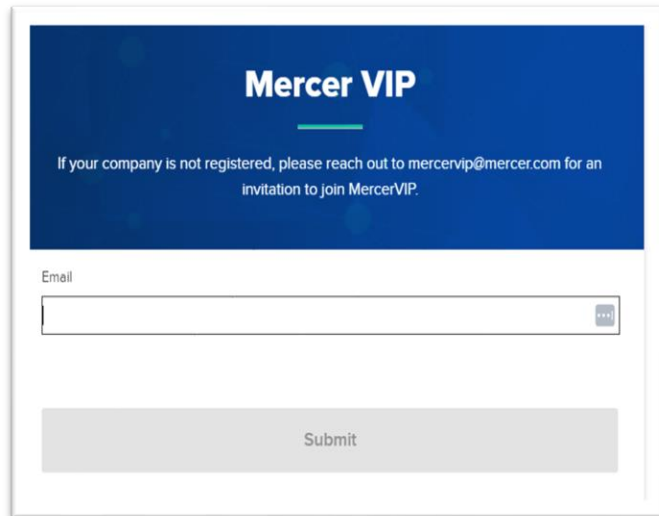
Thank you for registering! You now have access to the Mercer Account Center.

Cancel Log In

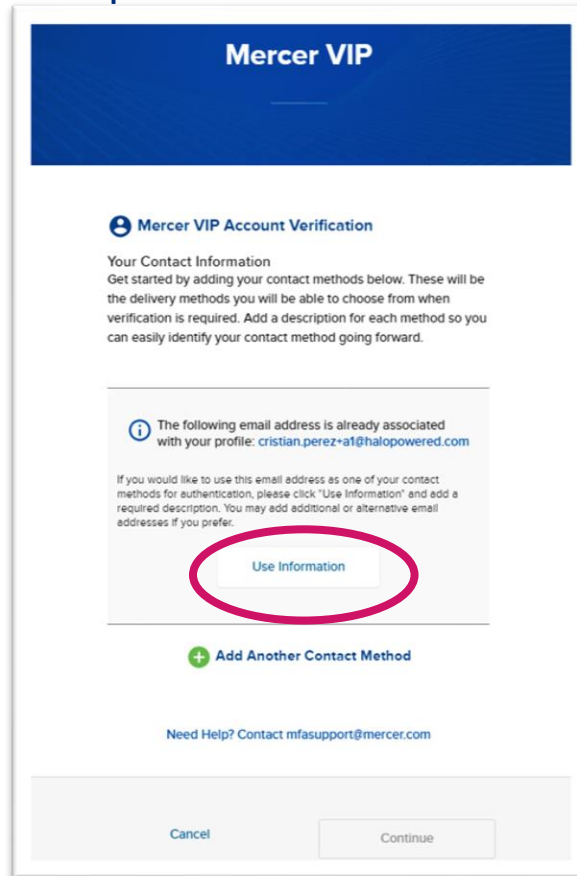
MercerVIP

Email Confirmation-Use information

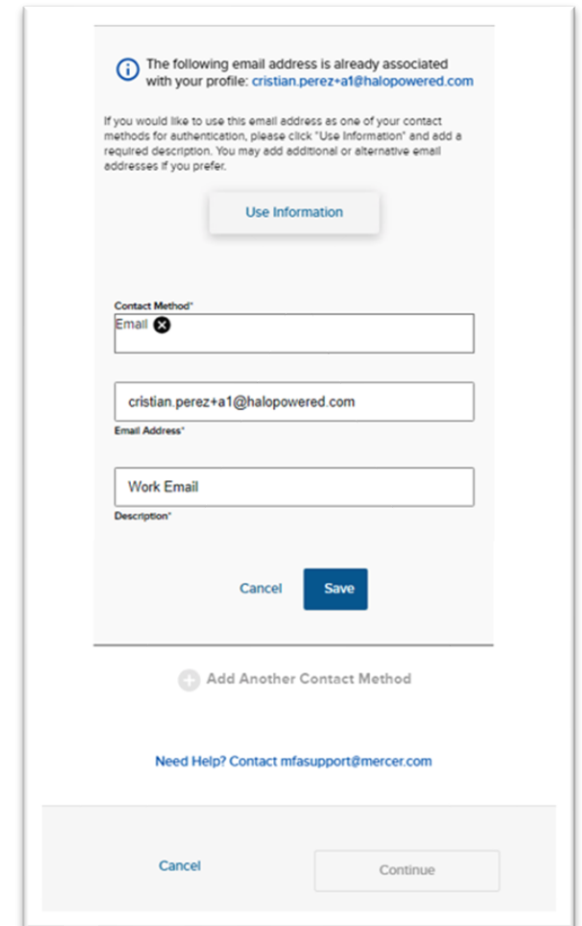
After you confirm your email, you will be directed to log in with your credentials and password and complete multi-factor authentication (MFA). If you click **Use Information** you'll use the same email address you registered in MercerVIP as your MFA method. You can add additional methods explained on the next slide.



The registration form has a blue header with the text "Mercer VIP". Below the header, it says "If your company is not registered, please reach out to mercervip@mercer.com for an invitation to join MercerVIP." There is an "Email" input field with a placeholder and a "Submit" button at the bottom.



The verification screen has a blue header with "Mercer VIP". Below it is the "Mercer VIP Account Verification" section. It says "Your Contact Information" and "Get started by adding your contact methods below. These will be the delivery methods you will be able to choose from when verification is required. Add a description for each method so you can easily identify your contact method going forward." There is a message: "The following email address is already associated with your profile: cristian.perez+a1@halopowered.com". Below this is a "Use Information" button, which is circled in pink. At the bottom, there is an "Add Another Contact Method" button and a "Need Help? Contact mfasupport@mercer.com" link. There are "Cancel" and "Continue" buttons at the very bottom.



This form shows the "Use Information" button from the previous screen. It has a message: "The following email address is already associated with your profile: cristian.perez+a1@halopowered.com". Below this is a "Use Information" button. There are input fields for "Contact Method*", "Email", "Email Address*", "Work Email", and "Description*". At the bottom, there are "Cancel" and "Save" buttons. There is also an "Add Another Contact Method" button and a "Need Help? Contact mfasupport@mercer.com" link. There are "Cancel" and "Continue" buttons at the very bottom.

Note: If you enter your wrong credentials, there will be a warning indicating your email address or password is incorrect

MercerVIP

Email Confirmation-Add Another Contact Method

If you click **Add Another Contact Method** you'll need to introduce an alternative contact information to authenticate your account. We recommend using a cell phone number.

The diagram illustrates the process of adding a new contact method to a Mercer VIP account. It consists of three sequential screens connected by red arrows.

Screen 1: Mercer VIP Account Verification

Header: Mercer VIP

Section: Mercer VIP Account Verification

Text: Your Contact Information
Get started by adding your contact methods below. These will be the delivery methods you will be able to choose from when verification is required. Add a description for each method so you can easily identify your contact method going forward.

Message: The following email address is already associated with your profile: cristian.perez+a1@halopowered.com

Text: If you would like to use this email address as one of your contact methods for authentication, please click "Use Information" and add a required description. You may add additional or alternative email addresses if you prefer.

Buttons: Use Information, **+ Add Another Contact Method** (circled in red), Need Help? Contact mfasupport@mercer.com, Cancel, Continue

Screen 2: Mercer VIP Account Verification

Text: Your Contact Information
Get started by adding your contact methods below. These will be the delivery methods you will be able to choose from when verification is required. Add a description for each method so you can easily identify your contact method going forward.

Form Fields:

- Contact Method: Email (cristian.perez+a1@halopowered.com)
- Work Email: Description
- Contact Method: Email (cristian.perez+a1@halopowered.com)
- Email Address: cristian.perez+a1@halopowered.com
- Email Address: cristian.perez+a1@halopowered.com
- Description: cristian.perez+a1@halopowered.com

Buttons: Cancel, Save, + Add Another Contact Method, Need Help? Contact mfasupport@mercer.com, Cancel, Continue

Screen 3: Mercer VIP Account Verification

Text: Your Contact Information
Get started by adding your contact methods below. These will be the delivery methods you will be able to choose from when verification is required. Add a description for each method so you can easily identify your contact method going forward.

Form Fields:

- Contact Method: Email (cristian.perez+a1@halopowered.com)
- Work Email: Description
- Contact Method: Phone (91164640664)
- Country Code: 54
- Phone Number: 91164640664
- Personal Phone: Description

Buttons: + Add Another Contact Method, Need Help? Contact mfasupport@mercer.com, Cancel, Continue

MercerVIP

Email Confirmation

After you choose either of the validation methods. Click on Continue to receive a unique code and enter this code to confirm your account

Mercer VIP

Mercer VIP Account Verification
Your Contact Information
Get started by adding your contact methods below. These will be the delivery methods you will be able to choose from when verification is required. Add a description for each method so you can easily identify your contact method going forward.

Contact Method

Email

cristian.perez+a1@halopowered.com

Email Address

Contact Method

Phone

91164640664

Country Code
54
Phone Number

Contact Method

Personal Phone

Description

+ Add Another Contact Method

Need Help? Contact mfasupport@mercer.com

Cancel

Continue



Mercer VIP Account Verification
Choose Contact Method
To protect your information please select a contact method below to receive a one time verification code. Please note that if phone number is selected then it needs to start with country code +1

Work Email

cr*****@**lopowered.com

☒ Receive an Email

MMC Email

cr*****@**c.com

☐ Receive an Email

Personal Phone

*****0664

☐ Receive a Text ☐ Receive a Call

Need Help? Contact mfasupport@mercer.com



Mercer VIP Account Verification
Verify your identity
Please enter the one-time code sent to cr*****@**lopowered.com (Work Email) within 10 minutes. If you did not receive a code, please check your spam folder.

Verification Code*

Verification Code

Send a new verification code

or

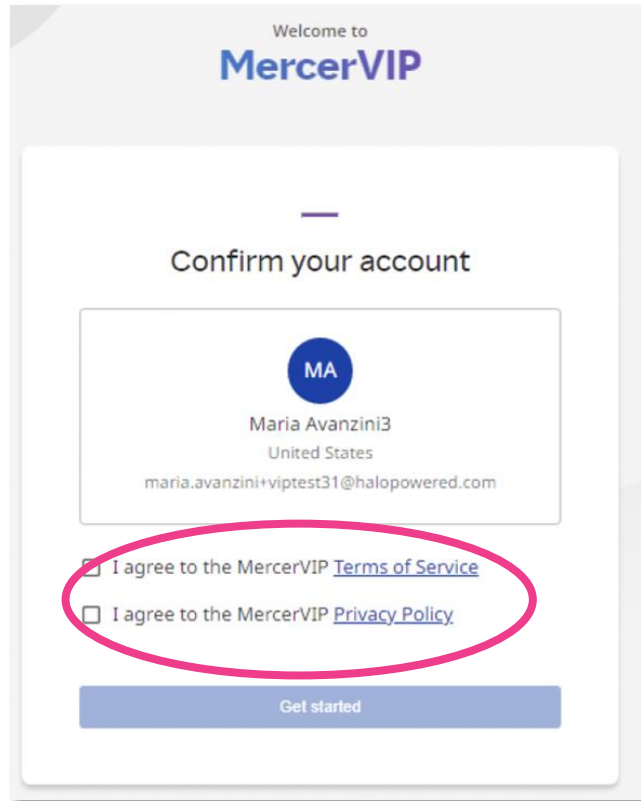
Choose another contact method

Cancel

Confirm

MercerVIP

Vendor User Onboarding



Welcome to
MercerVIP

Confirm your account

MA

Maria Avanzini3
United States
maria.avanzini+viptest31@halopowered.com

☒ I agree to the MercerVIP [Terms of Service](#)

☐ I agree to the MercerVIP [Privacy Policy](#)

Get started

The image shows a web form for confirming a MercerVIP account. At the top, it says 'Welcome to MercerVIP'. Below that is a section titled 'Confirm your account'. Inside this section, there is a profile card for 'Maria Avanzini3' from the 'United States' with the email 'maria.avanzini+viptest31@halopowered.com'. Below the profile card, there are two checkboxes. The first checkbox is checked and is circled in red; it reads 'I agree to the MercerVIP Terms of Service'. The second checkbox is unchecked and also circled in red; it reads 'I agree to the MercerVIP Privacy Policy'. At the bottom of the form is a blue button labeled 'Get started'.

To complete the registration process, you will need to accept the MercerVIP Terms & Conditions and Privacy Policy.

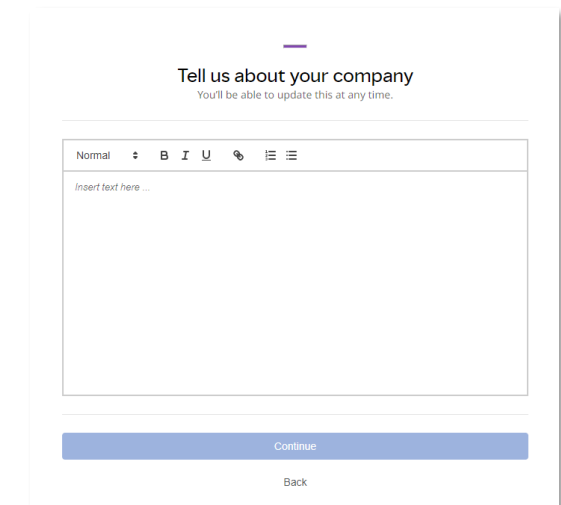
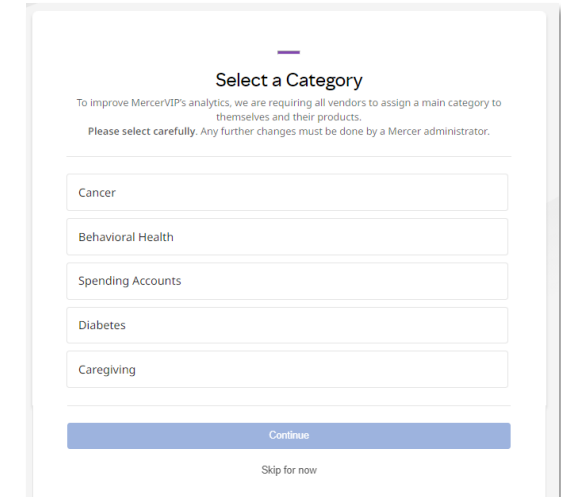
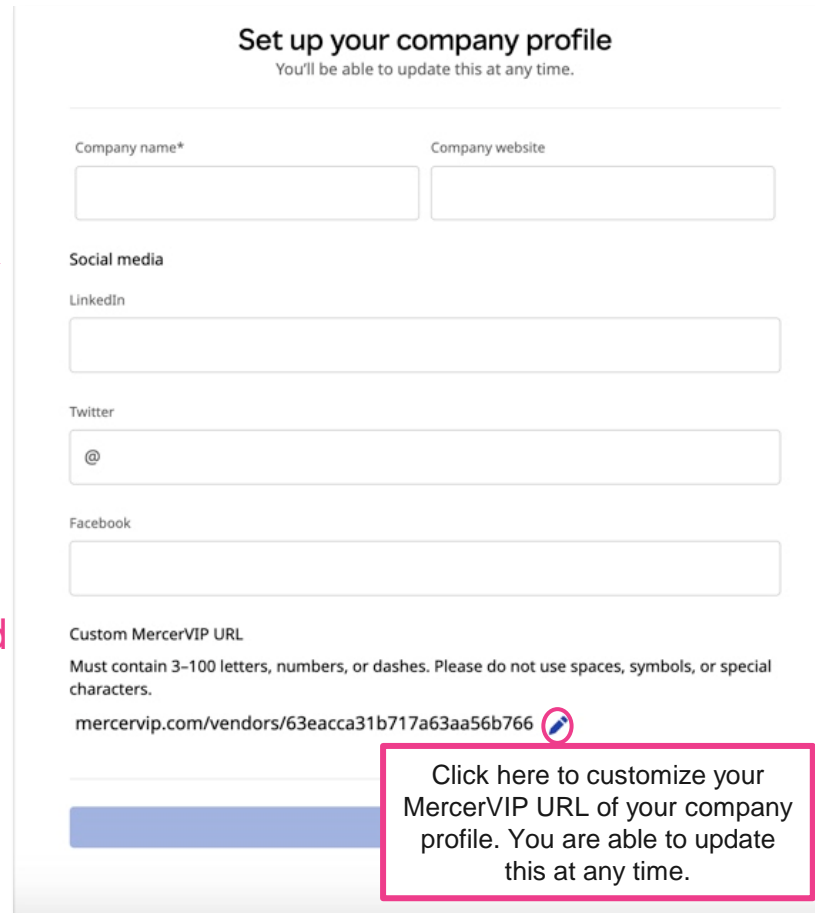
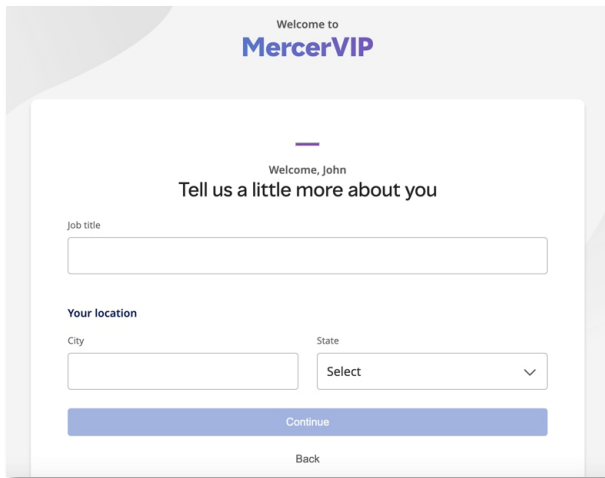
After you review the Terms of Service and Privacy Policy, click the check boxes to agree and click **Get started** to complete the sign up process.

Please note: the first user to create a MercerVIP account at your company must also have the authority to accept the Terms of Use and Mercer Privacy Policy on behalf of your organization.

MercerVIP

Entering your information

When you log in to MercerVIP for the first time, you will be asked to fill out some basic profile information about yourself and your company. Once you have completed all necessary information, click **Continue**, and you will be able to access the MercerVIP platform.



If your company has a MercerVIP profile that has migrated from the old platform, your information will be pre-populated and you can confirm the information to continue.

Click here to customize your MercerVIP URL of your company profile. You are able to update this at any time.

Homepage and Navigation Panel



MercerVIP

Homepage Dashboard and Navigation Panel

The dashboard and left navigation panel are the starting point each time you login to MercerVIP.

On the **Dashboard**, you will be able to see the following sections:

1. **Message Center** – Messages you received from Mercer consultants (This section is only displayed if you have unread messages)
2. **Active RFPs** – Active RFPs from Mercer consultants
3. **Notifications** – Check Alerts, Reminders, actions, etc.

The screenshot shows the MercerVIP dashboard interface. A pink callout box with an arrow pointing to the left navigation panel says "Click here to expand/collapse the names of each icon". The dashboard includes a welcome banner for "John", a Message Center with one unread message from Ethan Boyd, and an Active RFPs table with two entries. The left navigation panel lists various sections like Dashboard, RFP Tracker, Messages, Team, Company Profile, Overview, Products, Collateral, Events, Analytics, RFP Insights, Interaction Analysis, and Get Support.

Click here to expand/collapse the names of each icon

MercerVIP

Welcome, John

Message Center Showing 1 of 1 View all

Message Date ↑↓

Ethan Boyd <ethan.boyd@mercervip.com> 12/08/2023

Hello, my client would like to schedule a demo to learn more about your product. Thanks

Active RFPs Showing 5 of 21 View all

Name ↑↓	Client ↑↓	Product	RFP Category ↑↓	Status ↑↓	Bid Date ↑↓	Date Due ↑↓
Lisa Test	Tiger	Lion Cancer Screening Test	Cancer	Unread	09/29/2023	10/13/2023
Mercer Learning Day Test RFP	Tiger	Lion Cancer Screening Test	Cardiovascular Health	Unread	08/24/2023	08/24/2023

Navigation Panel:

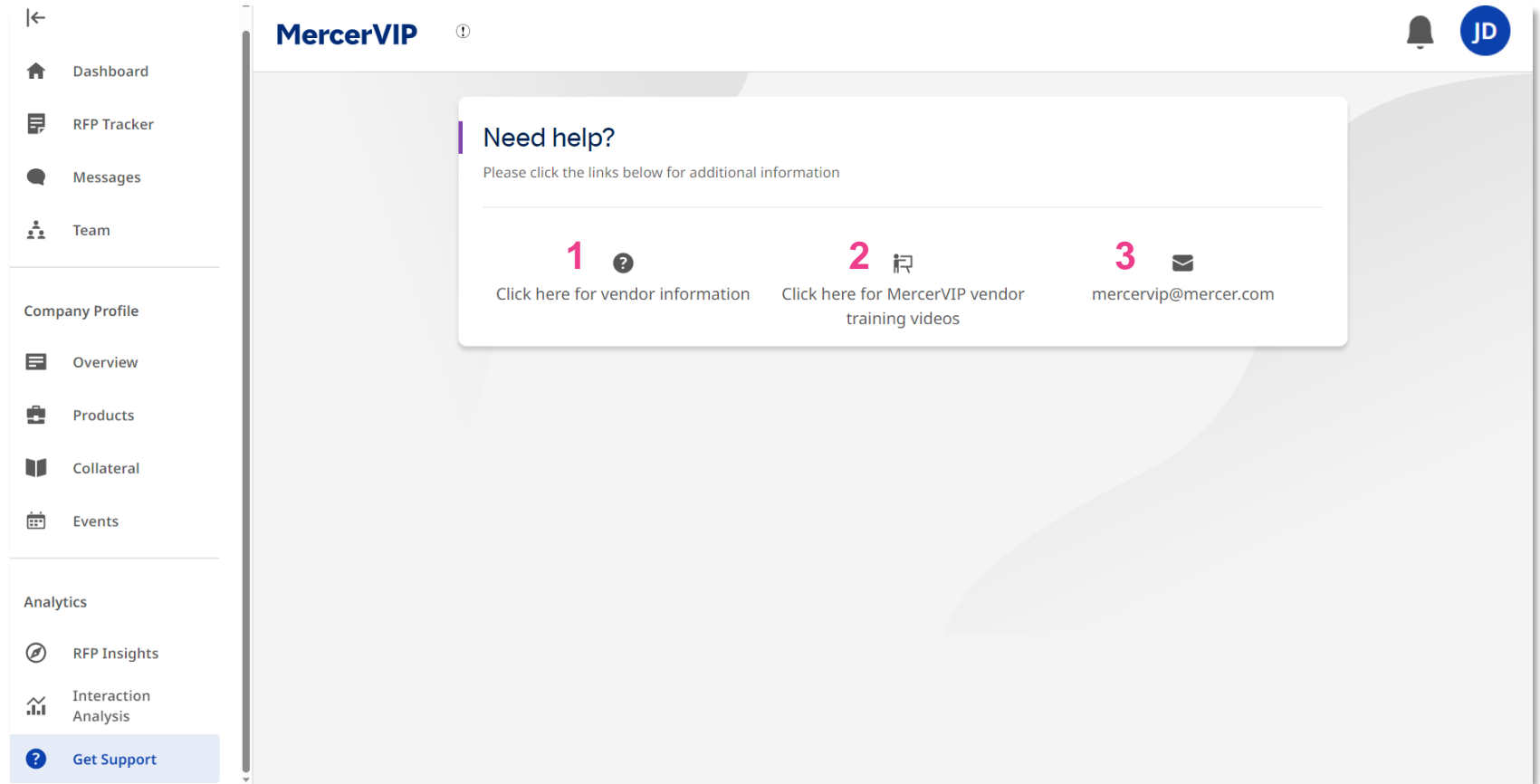
- Dashboard
- RFP Tracker
- Messages
- Team
- Company Profile
 - Overview
 - Products
 - Collateral
 - Events
- Analytics
 - RFP Insights
 - Interaction Analysis
 - Get Support

MercerVIP

Get Support

The **Get Support** page shows resources and training materials on how to use the platform.

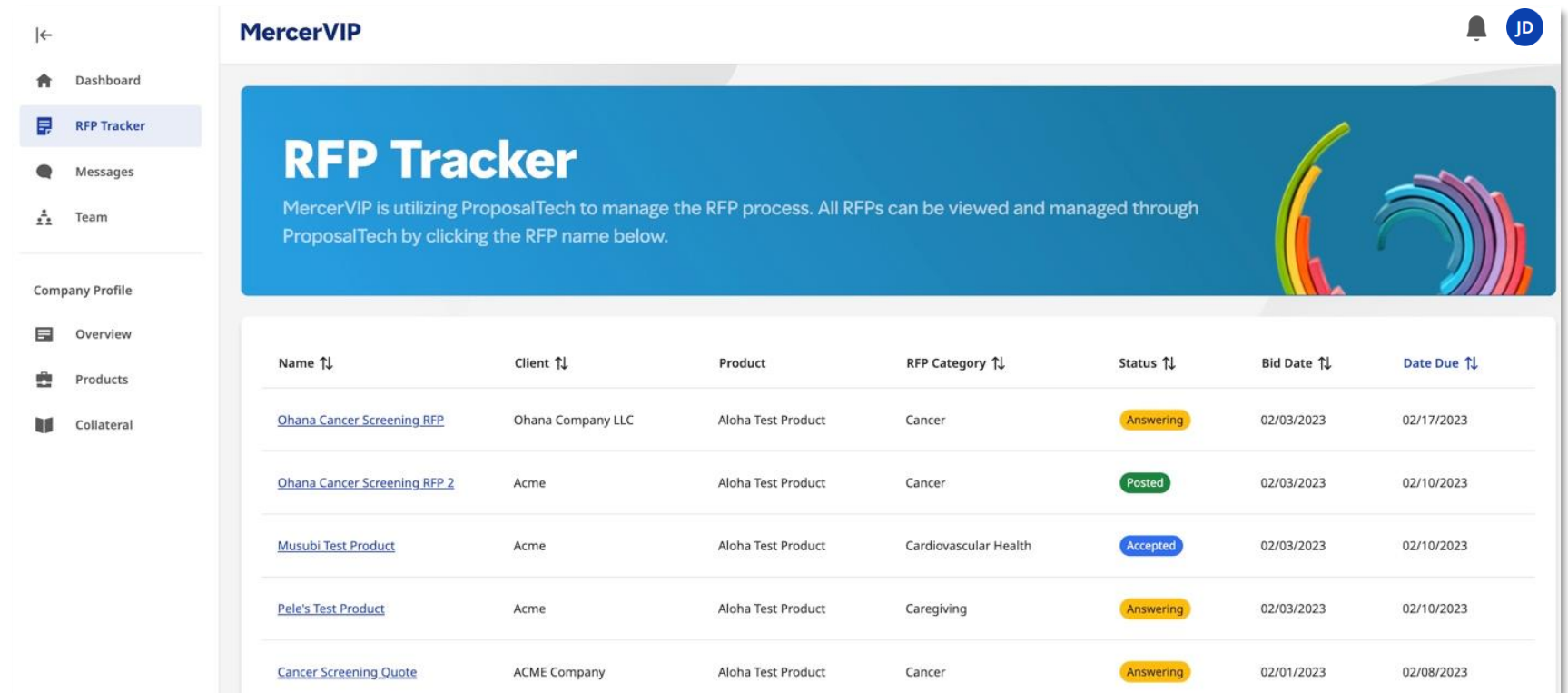
1. **Click here for vendor information** – Takes you to the vendor training guide
2. **Click here for MercerVIP vendor training videos** – Takes you to training videos
3. **[MercerVIP@mercer.com](mailto:mercervip@mercer.com)** – Creates an email where you can reach out to the MercerVIP team for additional help



MercerVIP

RFP Tracker

The **RFP Tracker** page shows all of your active and closed RFPs associated with your organization. For more details on managing and responding to RFPs, please see [Vendor RFP Management](#).

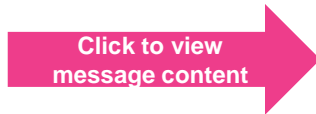


Name ↕	Client ↕	Product	RFP Category ↕	Status ↕	Bid Date ↕	Date Due ↕
Ohana Cancer Screening RFP	Ohana Company LLC	Aloha Test Product	Cancer	Answering	02/03/2023	02/17/2023
Ohana Cancer Screening RFP 2	Acme	Aloha Test Product	Cancer	Posted	02/03/2023	02/10/2023
Musubi Test Product	Acme	Aloha Test Product	Cardiovascular Health	Accepted	02/03/2023	02/10/2023
Pele's Test Product	Acme	Aloha Test Product	Caregiving	Answering	02/03/2023	02/10/2023
Cancer Screening Quote	ACME Company	Aloha Test Product	Cancer	Answering	02/01/2023	02/08/2023

MercerVIP

Messages

The **Messages** section contains the list of messages sent by Mercer consultants (Including pricing and demo requests). All users at your company will receive email notifications for messages and RFP invitations (Visit the Team Management section to learn more about notification permissions). You or your team members can respond to messages directly in the MercerVIP application. Any message sent by a team member is visible in the email thread. You can add attachments to your responses to consultants.



MercerVIP

Messaging

Request for Info: Pricing, Demo
John Smith john.smith@mercervip.com

Sep 24, 2024

John Smith john.smith@mercervip.com 02:06 PM

Test

Request Type	Pricing, Demo
Client Details	Test Situs state: Florida Employer size: 1000
Products	Lion Cancer Screening Test
Due Date	Sep 24, 2024

Great

Send

MercerVIP

Team

A list of active and pending team members from your company along with their permission level is displayed on the **Team** page. In this page, you can add, change permissions or remove a member. For more details on user management, please see [Vendor User Management](#).

Team members

Add team member:

Active • 10

Inactive • 6

Pending invites • 7

Name ↑↓	Email	Permissions ↑↓	Message Center ⓘ	RFP Emails ⓘ	
Mercervip, Mercervip	mercervip@mercervip.com	Admin ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deactivate
Doe, John	mercervipteam+32@gmail.com	✓ Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Deactivate
		✓ Editor			
		✓ Read-only			

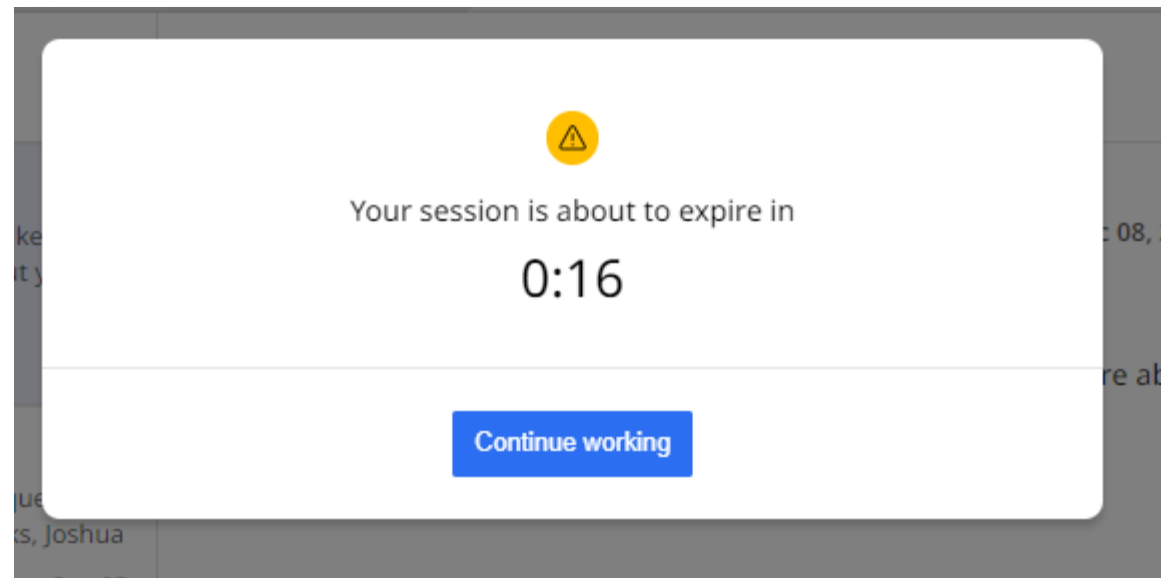
Input your colleague's email address to send them an invite to join

Inactivity Time Out Feature

System Notification

The MercerVIP application has a 30-minute time out feature to ensure system efficiency, resource management, and security. If no activity is detected after 28 minutes, a 2-minute warning notification will be displayed. Simply click Continue Working to refresh your session. If **Continue Working** is not clicked, the system will log you out and you could lose your work.

Note: Updating answers in the Company or Product Questionnaire does not count as system activity unless the save button is used. Please keep this in mind as you are working on your profile. Only utilize one tab within your browser when using MercerVIP.



Profile and Product Creation

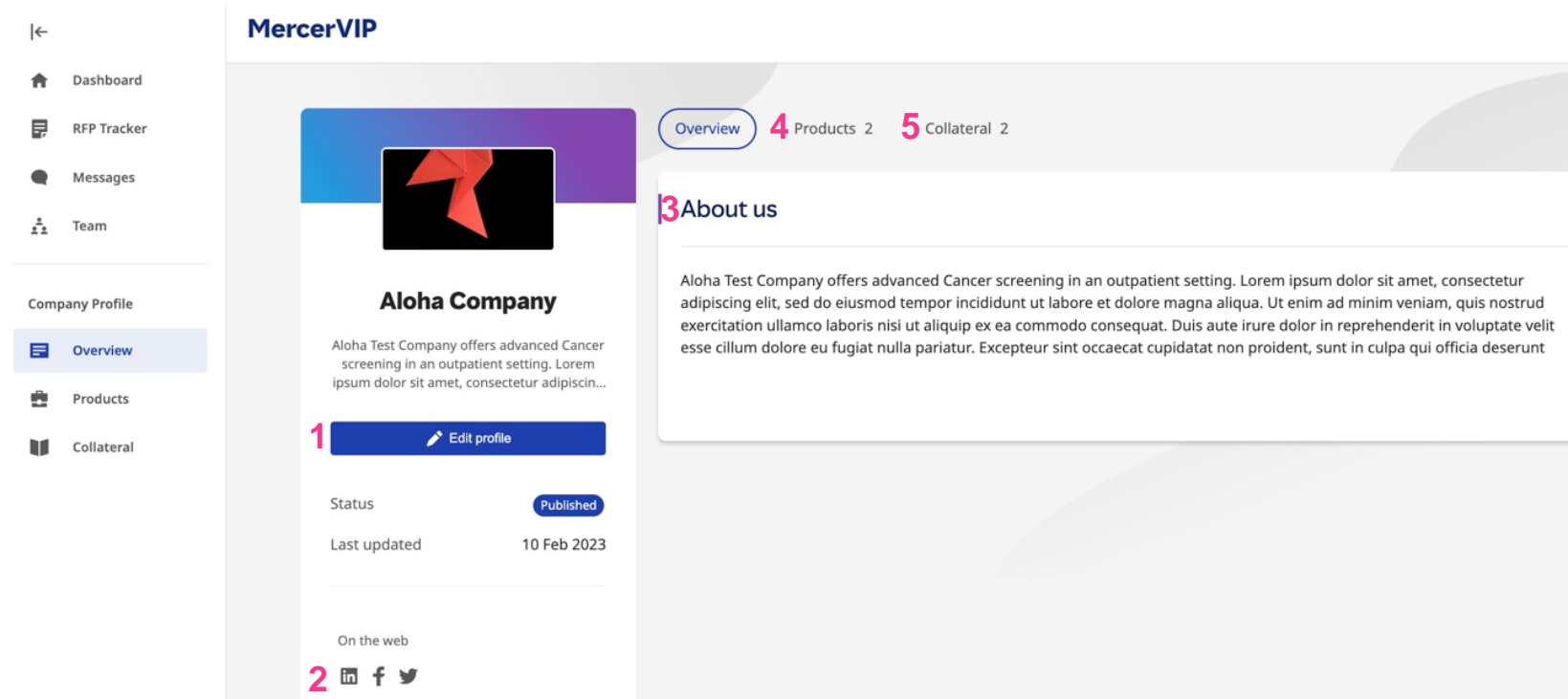
4

MercerVIP

Overview

In **Overview** page, you can edit your company profile.

1. **Edit profile** – Edit your company page
2. **Social media account links** – Links to your LinkedIn, Facebook and Twitter pages
3. **About us** – Brief overview of your company
4. **Products** –Page that leads you to your products
5. **Collateral** – View or upload company level marketing and informational materials. **Note:** Most recent documents will display first



The screen will show you a similar view to what consultants will see as your company's profile.

MercerVIP

Editing the Company Profile

Only users with Admin or Editor access can create or make updates to the company profile. Click **Edit profile** to begin.

Edit Profile
Last saved Dec 4, 2023 at 8:13pm

⚠ You are editing a published vendor
Any saved changes will be immediately visible. All mandatory fields must be completed.

Basic Information

All fields marked with an asterisk (*) are required.

Company Logo
Maximum file size: 5MB. JPEG, PNG, or GIF only.
Recommended size/aspect ratio: 800px x 450px
[Upload](#) [Remove](#) **Upload/Remove Company Logo**

Company name *
Mercer Demo

Company display name *
Mercer Demo

Company website *
<https://about.mercervip.mercer.com/>

Contact email *
mercervip@mercer.com

Main vendor category *
ACA Compliance Services
To change, please [contact a Mercer administrator](#) **Select Primary Vendor Category**

Custom MercerVIP URL
Must contain 3-100 letters, numbers, or dashes. Please do not use spaces, symbols, or special characters.
mercervip.com/vendors/63e5001bab0c78009a136f72 **Customize your MercerVIP URL**

Contents

- Basic Information ☒
- On the web ☒
- About us ☒
- Company questionnaire ☒

1 [Save](#)

2 [Unpublish](#)

3 [Preview](#)

4 [Exit](#)

5

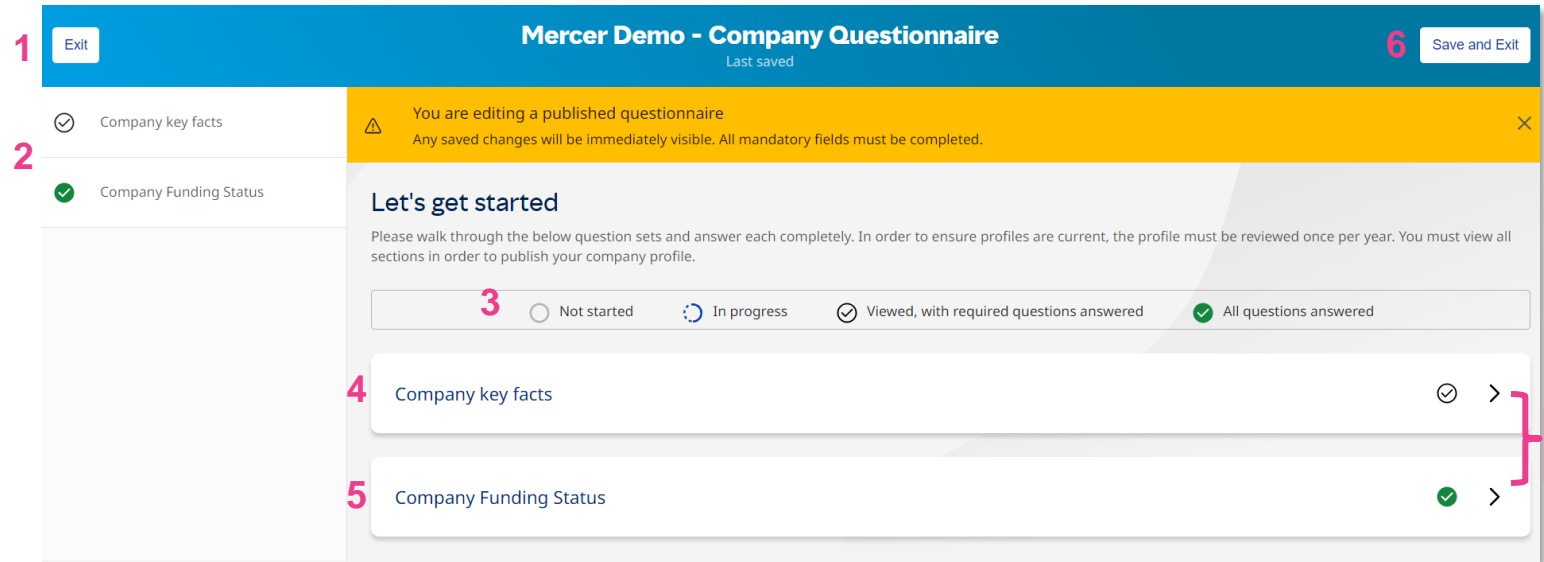
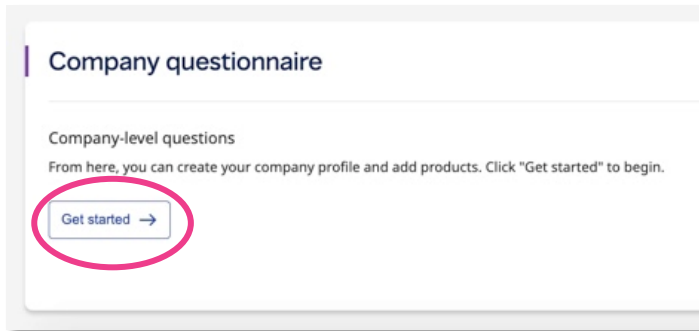
Note: **Main vendor category** is required to publish your company. Once selected you will need to reach out to the MercerVIP team to make any changes

- 1. Content Status Tracker** – Quick glance of your company setup status (Note: Check represents complete and no checkmark requires sections that need to be completed)
- 2. Save** – Save your edits
- 3. Publish/Unpublish** – Publish/Unpublish your company profile (Note: Publish option will only appear after the required fields have been completed)
- 4. Preview** – Takes you to preview mode of your profile
- 5. Exit** – Takes you back to Company profile

MercerVIP

Company Questionnaire

On the last section of the Company profile, click **Get Started** to begin filling out the question sets related to your company. This information will be used to prepopulate responses to RFPs that you are invited to by Mercer consultants.



Note: Some required questions are tied to filters which consultants can use to narrow down their search results. It is important to answer all questions completely.

1. **Exit** – Takes you back to Company edit page without saving your edits
2. **Question Navigation** – Click on the question set name to view the question set
3. **Legends for Question Set Status** – Status of completion for each question set:
 - No checkmark – Incomplete responses
 - White checkmark – Viewed with required questions answered
 - Blue checkmark – All questions were answered
4. **Company Key facts Question Set** – Key facts about your company
5. **Company Funding Status Question Set** – Funding questions about your company
6. **Save and Exit** – Save content and leave Company Questionnaire page

MercerVIP

Company Questionnaire

1. On the next screen, you will input **Company Key facts**
2. Click **Save and Continue** when complete
3. On the next screen, you will input **Company Funding Status**
4. Click **Save and Exit** when complete to return back to Edit company page. Make sure to click Publish to publish your product.

Exit

Mercer Demo - Company Questionnaire

Last saved

Save and Exit

Company key facts

Company key facts

Home / Company key facts

1 of 2

Clear form Mark all as N/A

Section 1 of 2

Save Save and Continue

All fields marked with an asterisk (*) are required.

Describe your approach to business continuity with your clients, in the event of a catastrophic event, major outage or pandemic that would prevent you from operating from your offices as normal for more than a day? Please add any attachments as necessary, in the collateral section below

* Year Founded

2017

Exit

Mercer Demo - Company Questionnaire

Last saved

Save and Exit

Company key facts

Company Funding Status

Company Funding Status

Home / Company Funding Status

Clear form Mark all as N/A

Section 2 of 2

All fields marked with an asterisk (*) are required.

Total Company Funding

How much funding has your company received over its lifetime?

☒ \$1 - \$4,999,999

☒ \$5,000,000 - \$9,999,999

☒ \$10,000,000 - \$24,999,999

☒ \$25,000,000 - \$49,999,999

☒ Over \$50,000,000

Note that questions with asterisk require your responses. We encourage you to complete all questions with the most accurate and up to date information. If certain questions do not pertain to your organization, you can leave it blank or put N/A.

MercerVIP

Creating and Editing Products

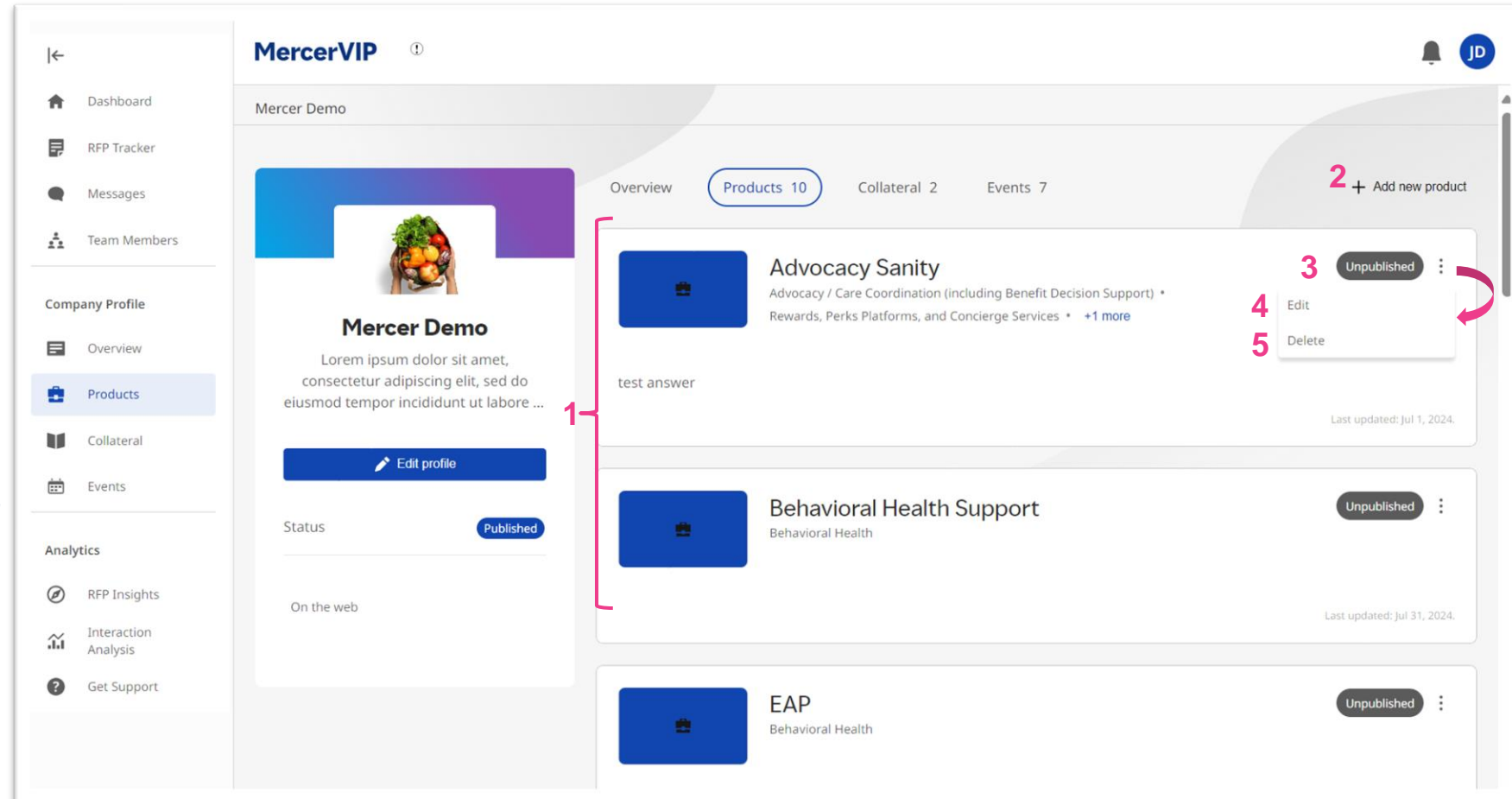
Adding products is a critical part of participating in MercerVIP. This is how consultants find details on the products your company offers to employers and how you show up in a MercerVIP search result.

On the **Products** page, you can

1. **View product**
2. **Add new product**
3. **View publication status of product**
4. **Edit product**
5. **Delete product**

if the product is included in an RFP with the status 'Preparing', 'Released', or 'Answering', the system will display a warning message, and you will not be able to delete the product.

Click **Add new product** to create and build new product. See next page



MercerVIP

Creating Product

After you click **Add new product** in the previous step, you will be directed to complete the following sections:

- Overview
 - Product overview
 - Product key facts
 - Product key benefits
- Category selection
- RFX questionnaire

Edit product
Last saved Oct 30, 2023 at 11:48am

Overview

All fields marked with an asterisk (*) are required.

Product Logo
Maximum file size: 5MB. JPEG, PNG, or GIF only.
Recommended size/aspect ratio: 800px x 450px
[Upload](#)

Product name *
Tiger Spending Account Test

Contact email *
test@test.com

Website URL

Main product area *
None selected Assign
Once published, this will require a Mercer administrator to edit

Product overview *
Please complete all information below completely and accurately. These sections will be viewable by consultants on your profile page.

Normal B I U

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure

Add Content

1 Overview ☒

2 Category selection ☒

3 RFX questionnaire ☒

4 Save

5 Unpublish

6 Delete

7 Preview

8 Exit

1. **Content Status Tracker** – Quick glance of your product setup status (Note: Blue check represents complete and no check requires sections that need to be completed)
2. **Save** – Save you edits
3. **Publish/Unpublish** – Publish/Unpublish your product profile (Note: Publish option will only appear after the required fields have been completed)
4. **Delete** – Delete your product
5. **Preview** – Takes you to preview mode of your profile
6. **Exit** – Takes you back to the Product page


Creating Product - Overview

In the Overview section, you can upload/remove a logo associated with your product (Note that maximum file size is 5MB. JPEG, PNG, or GIF only). You are required to include your product name and contact email. You can put a website URL.

The Product overview, Product key benefits and Product key facts are required fields to be completed. This information will be displayed to Mercer consultants as they research products and create projects.

Overview

All fields marked with an asterisk (*) are required.



Product Logo

Maximum file size: 5MB. JPEG, PNG, or GIF only.

Upload

Remove

Product name *

Aloha Product #2

Contact email *

contact@alohacompany.com

Website URL

Product overview *

Please complete all information below completely and accurately. These sections will be viewable by consultants on your profile page.

Normal B I U Link List

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Product key benefits *

Use this section to document the key benefits to employers and users for this product. This text will appear to consultant on your Product profile page.

Normal B I U Link List

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
- Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Product key facts *

Use this section to document key facts about this product that you want consultants to understand. This text will appear to consultants on your Product profile page.

Normal B I U Link List

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

MercerVIP

Creating Product - Categorization

Categorizing your product is a crucial step in your product creation. Categorization is the main filtering functionality within the consultant search. Outside of searching directly for a company or product name, consultants will utilize the category and subcategory sections to begin research for their clients.

Select one main category that would best classify your product. Then select one or multiple subcategories to further categorize your product offering.

For more information on category and subcategory definitions, please see the [Category Reference Guide](#).

Category selection

In this section, you will choose which category (or categories) this solution fits into. These categories are how Mercer's employer clients evaluate vendors in the health and benefits space, so please choose the best fit. Please do not select more than two main categories. Main categories should only be selected for your solution if that category is the focus of your solution, not a component (e.g. telemedicine can be a focus or a component). Selecting more than two categories may cause your solution to show up lower in the search as the search prioritizes the closest match to the terms entered by the consultant. If your company offers more than one solution, it is recommended that you create separate solution entries for each (e.g. one solution entry for Diabetes and a separate one for Fraud Waste & Abuse). The information in this section will only be viewable by authorized users at your company and Mercer consultants. If you have questions on how to categorize your solutions after reviewing the category definitions, please email mercervip@mercer.com.

0 ACA Compliance Services

Services to assist with ACA reporting – minimum essential coverage and employer shared responsibility reporting; full-time (30+ hour) tracking/eligibility determinations; and responses to IRS penalty letters.

ACA Measuring & Tracking

Solutions that assist with managing and tracking ACA metrics like full-time (30+ hour) tracking / eligibility determinations

ACA Reporting

Solutions that assist employers with ACA reporting

Expert Medical Opinions

Services that provide access to members struggling with a medical decision to have their medical case reviewed by experts to confirm a diagnosis and/or treatment plan, or to offer an alternative

Financial Well-Being

Services that support employees and members successfully manage financial expenses.

Genetics

Click to view or hide subcategories

MercerVIP

Creating Product – RFX Questionnaire

After you categorize your product, you can start answering Mercer’s standard RFX questions. These questions and answers will be included in all RFPs for the selected products. We recommend you complete these questions so that you can respond to RFPs more quickly once you are invited to participate in an opportunity.

Click **Get started** to review and respond to the question sets.

RFX questionnaire

Download an Excel copy of the questionnaire

Product-level questions

In this section, you will provide product-specific information and respond to standard RFP questions about your product, including questions specific to the categories and subcategories selected in the prior step. Please complete all questions accurately. Once complete, these questions and answers will be viewable by Mercer consultants who are interested in learning more about your solution. They will also serve as your pre-populated answers for client-specific RFPs, which can be edited on a client-specific basis. Click "Get started" to begin.

If you'd like to answer these questions offline, go to the Vendor Detail Page from the menu option (Vendor Profile), go to the Products Tab then select a product (Go to the Product Detail Page), select the Summary Documents Tab and download the Rfx Report.

Once complete, you can then copy and paste your answers into MercerVIP.

Get started →

See next page

Note: Some required questions are tied to filters which consultants can use to narrow down their search results. It is important to answer all questions completely.

MercerVIP

Creating Product – RFX Questionnaire

Excel copy of the RFX
Questionnaire

	A	B	C	D	E	F	G	H	I	J
1	Company Overview									
2										
3	Company name	Mercer Demo								
4										
5	'Contact us' email	mercervip@mercer.com								
6										
7	Website	https://about.mercervip.mercer.com/								
8										
9	Twitter™ name									
10										
11	LinkedIn™ company page URL									
12										
13	Overview	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore								
14										
15	Company key facts									
16										
17	Describe your approach to business continuity with your clients, in the event of a catastrophic event, major outage or pandemic that would prevent you from operating from your offices as normal for more than a day? Please add any attachments as necessary, in the collateral section below			N/A						
18										
19	Year Founded*			2017						
20										
21	Company Financial Structure*	Single-select dropdown: · Private · Private with outside investors · Limited company · Partnership · Public company · Mutual company · Other		Private						
22										
23	If publicly traded, identify exchange(s) and symbol(s)			N/A						
24										
	If not publicly traded, indicate your financial stage and the capital invested in your organization or select private	Multi-select list: · Seed/Pre-Seed · Series A · Series B · Series C · Series D								

< >

Company Information

Solution Overview

Solutions

Clinical

Diversity & Inclusion

Solution Cost

Solutions Overview

Target Employer Bu ...

MercerVIP

Creating Product – RFX Questionnaire

After you click **Get started** from the previous step, the platform will take you to the question sets. The platform will guide you through completing each section of the RFX questionnaire. Information from the question sets will assist consultants with comparing products within the MercerVIP platform and will be prepopulated with each RFP submission.

You can update the answers to your questions at any time.

The screenshot shows the 'The Solution for Everything - RFX Questionnaire' interface. At the top, there is a blue header bar with an 'Exit' button (callout 1), the title 'The Solution for Everything - RFX Questionnaire', and a 'Save and Exit' button (callout 6). Below the header, on the left, is a list of question sets: Clinical, Diversity & Inclusion, Solution Cost, Solutions Overview, Target Employer Business Details, User Experience, and Communications. A bracket labeled '3' groups these items. The main content area has a 'Let's get started' section with instructions. Below this is a progress bar (callout 2) showing four status options: 'Not started', 'In progress', 'Viewed, with required questions answered', and 'All questions answered'. Under the progress bar, three question set cards are shown: 'Clinical', 'Diversity & Inclusion', and 'Solution Cost'. A bracket labeled '4' groups these cards. To the right of each card is a status indicator (callout 5) with a checkmark and a right arrow. The cards are currently marked as 'Not started'.

1. **Exit** – Takes you back to Product Detail page without saving your edits
2. **Legends for status of completion**
3. **Question Navigation** – Click on the question set name to view the question set
4. **Question Sets** – Takes you to the questions for the specific question set
5. **Status of Completion**
6. **Save and Exit** – Saves your edits and takes you back to Product Detail page

MercerVIP

Responding to questions

1. **Exit** – Takes you back to Product Detail page without saving your edits
2. **Question Navigation** – Takes you to the specific question set
3. **Actions: Copy From** – Allows you to copy and paste responses from a different product (if applicable)
4. **Actions: Clear form** – Removes all your responses in the question set
5. **Mark all as N/A** – If a section does not apply to your product, this function will answer all questions within the question set as Not Applicable
6. **Save** – Saves your edits
7. **Save and Continue** – Saves your edits and moves to the next question set
8. **Arrows** – Moves to the previous or next question set without saving your edits
9. **Save and Exit** – Saves your edits and takes you back to Product Detail page

The screenshot shows the 'Tiger Spending Account Test - RFX Questionnaire' interface. On the left is a sidebar with a list of categories: Clinical, Discovery Questions, RFX Questions, Diversity & Inclusion, Solution Cost, Solutions Overview, Target Employer Business Details, User Experience, Communications, and Compliance/Data Security. The main area is titled 'Discovery Questions' and shows 'Section 1 of 21'. A modal window titled 'Copy from another product' is open, showing a dropdown for 'Select product' and a 'Submit' button. A red arrow points from the 'Copy from...' option in the sidebar to the modal. Numbered callouts 1 through 9 are placed over the interface to correspond with the list on the left: 1. Exit button; 2. Question Navigation arrows; 3. Copy From action; 4. Clear form action; 5. Mark all as N/A action; 6. Save button; 7. Save and Continue button; 8. Navigation arrows; 9. Save and Exit button.

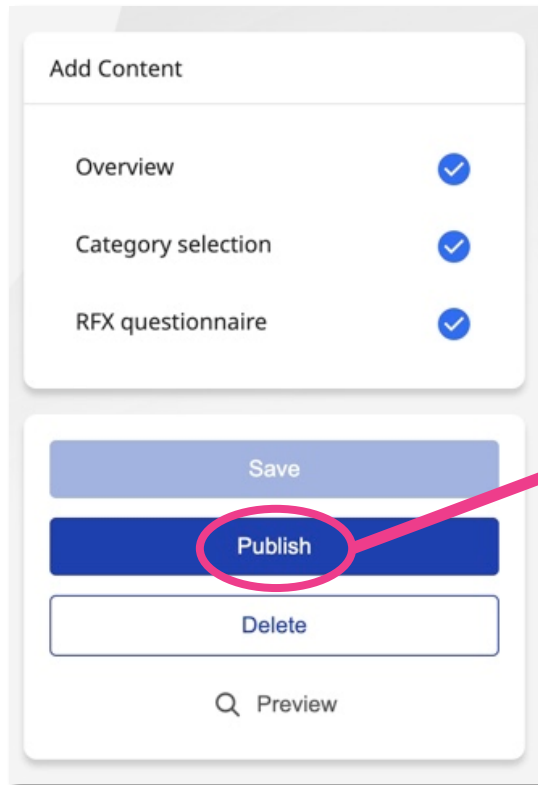
Pro Tip: If you already completed a question set from an existing product, you could use the "Copy from" feature to directly copy and paste responses from that product. We recommend utilizing this feature if your responses to certain question sets are the same across multiple products.

Pro Tip: If an entire question set does not apply to your product, you can use the "Mark all as N/A" feature to automatically complete each question as Not Applicable. You are still able to modify individual questions even after marking as N/A.

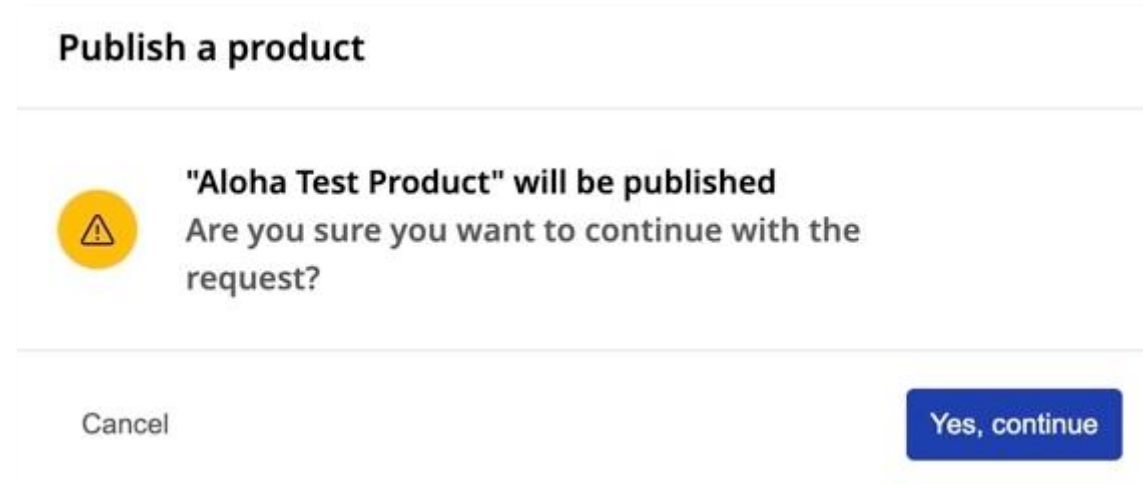
MercerVIP

Publishing Product

Once you have completed all sections of the product creation, navigate back to the Product Detail Page and click **Publish** product and then click **Yes, continue**. This will make the product visible and searchable to consultants.



The 'Add Content' sidebar shows three completed sections: Overview, Category selection, and RFX questionnaire, each with a blue checkmark. Below these are three buttons: 'Save' (light blue), 'Publish' (dark blue, circled in red), and 'Delete' (white with a blue border). At the bottom is a 'Preview' link with a magnifying glass icon. A pink arrow points from the 'Publish' button to the confirmation dialog on the right.



The 'Publish a product' dialog features a yellow warning icon with an exclamation mark. The text reads: '"Aloha Test Product" will be published' followed by 'Are you sure you want to continue with the request?'. At the bottom, there are two buttons: 'Cancel' and 'Yes, continue' (dark blue).

MercerVIP

Collateral

You can add informational/marketing materials or media associated with your product. To do this, click **Collateral** from the Product of your choice.

From this page, you can see a list of collateral pieces you have uploaded or linked to the platform. You can access them from the Documents or Media tab.

1. **Link Content** – Add a new link to your collateral
2. **Upload a file** – Add a new file
3. **Download** – Download your collateral
4. **Edit** – Edit information about existing collateral
5. **Delete** – Delete existing collateral

The screenshot shows the 'Collateral' tab selected in the top navigation bar. Below the navigation bar, there are two tabs: 'Documents 1' and 'Media 1'. The 'Documents 1' tab is active. Below the tabs, there are two sub-tabs: 'All' and 'Other 1'. The 'All' sub-tab is active. Below the sub-tabs, there is a table with the following columns: 'File name ↓', 'Description', and 'Last updated ↓'. The table contains one row with the following data: 'Test Product Doc' (with a link icon), 'Brief description of the document', and '01/30/2023'. To the right of the table, there is a vertical ellipsis menu. A pink box labeled 'See next page' is positioned above the table. A pink arrow points from the ellipsis menu to a list of actions: '3 Download', '4 Edit', and '5 Delete'. The top navigation bar has three tabs: 'Overview', 'Collateral 2' (selected), and 'Summary Documents 3'. The top right corner has two buttons: '1 Link content' and '2 Upload a file'.

File name ↓	Description	Last updated ↓
Test Product Doc Other	Brief description of the document	01/30/2023

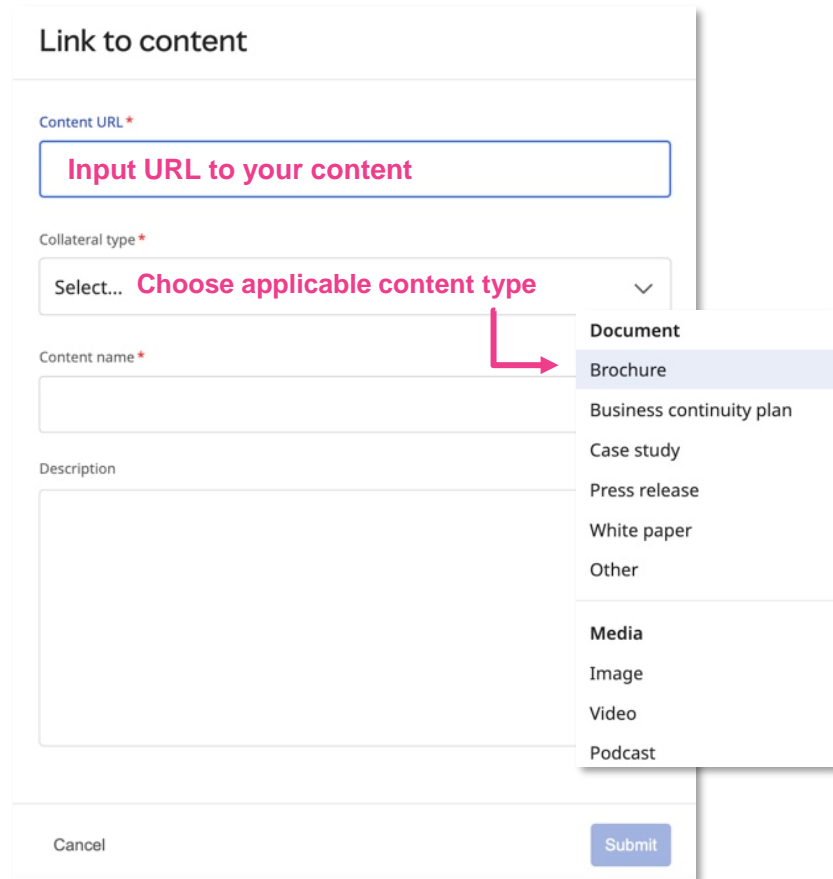
- 3 Download
- 4 Edit
- 5 Delete

Note: Newest uploaded documents will display at the top of the list

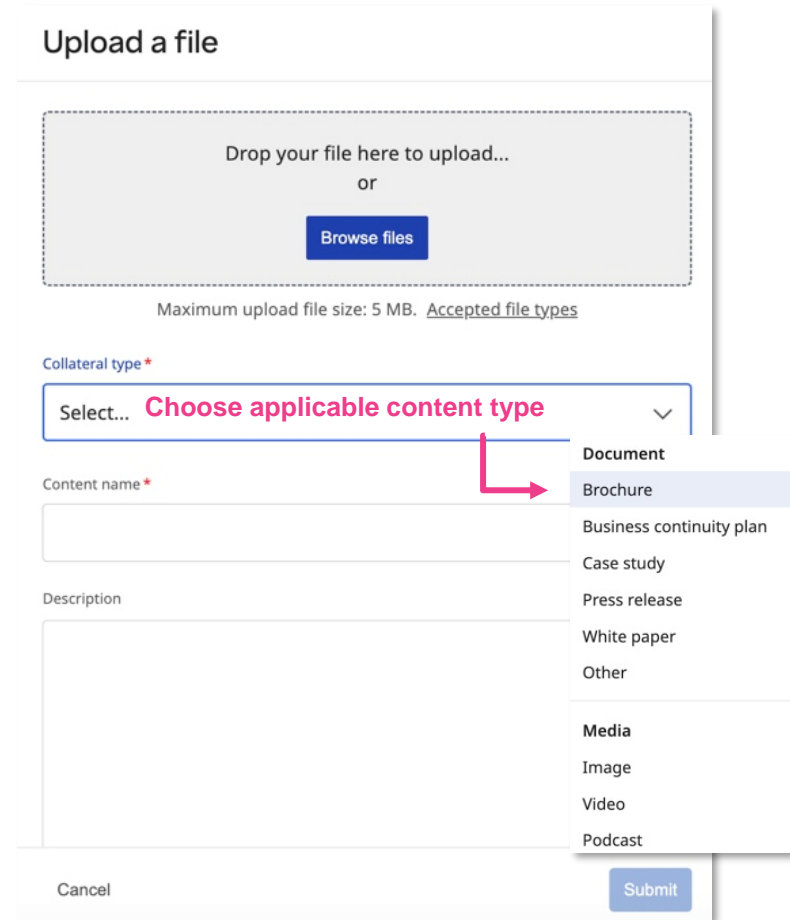
MercerVIP

Collateral

There are two ways to add collateral pieces to your profile: **Link to content** and **Upload a file**



The 'Link to content' form includes a 'Content URL' field with a placeholder 'Input URL to your content', a 'Collateral type' dropdown menu, a 'Content name' field, and a 'Description' text area. A dropdown menu is open for 'Collateral type', showing options: Document, Brochure, Business continuity plan, Case study, Press release, White paper, Other, Media, Image, Video, and Podcast. A red arrow points from the text 'Choose applicable content type' to the 'Brochure' option.



The 'Upload a file' form features a file upload area with the text 'Drop your file here to upload...' and a 'Browse files' button. Below this is a 'Collateral type' dropdown menu, a 'Content name' field, and a 'Description' text area. A dropdown menu is open for 'Collateral type', showing options: Document, Brochure, Business continuity plan, Case study, Press release, White paper, Other, Media, Image, Video, and Podcast. A red arrow points from the text 'Choose applicable content type' to the 'Brochure' option.

The following common file types are supported:

- PDF
- Word
- PPT
- Excel
- TXT
- CSV
- JPEG
- GIF
- PNG

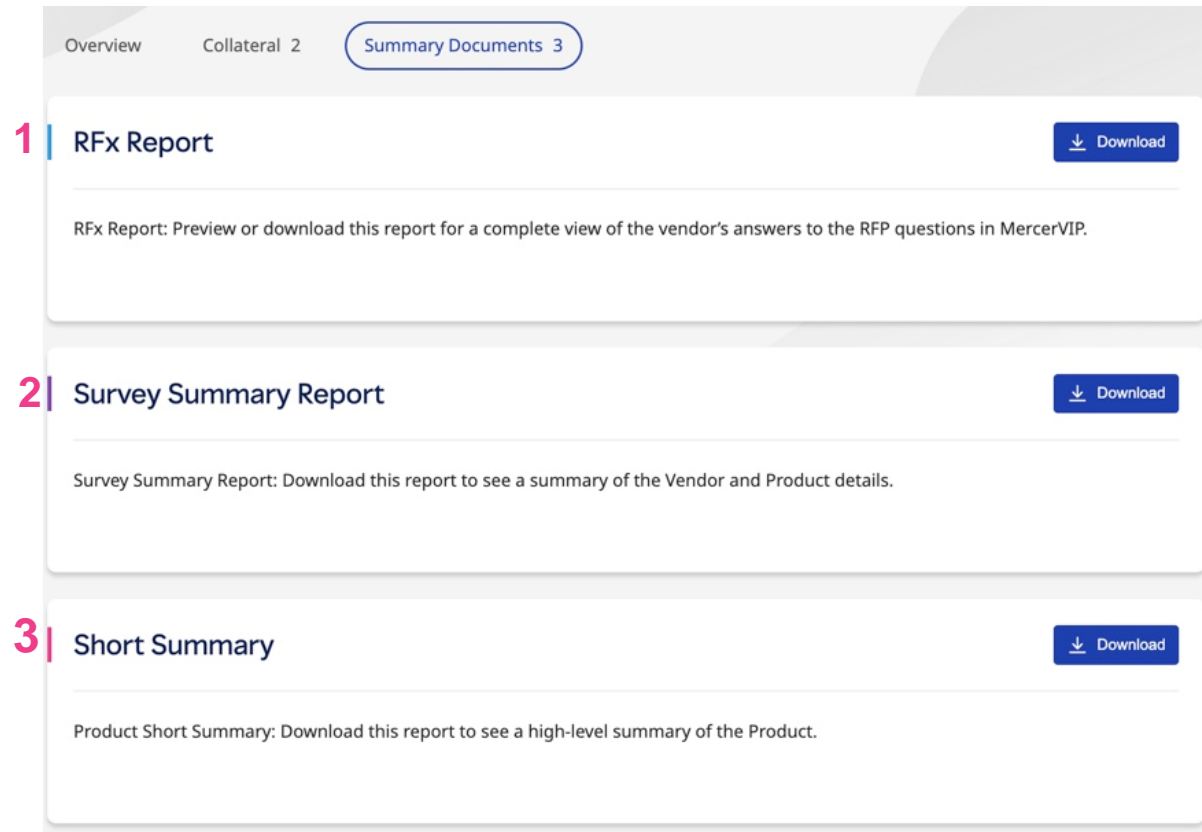
Note 5MB is the maximum upload file size.

After you complete the details of your collateral, click **Submit** to publish it

MercerVIP

Summary Documents

Once your product is published, you can view the Summary Documents that visualize the responses to the company and RfX questions completed. These documents are also available and accessible to consultants in the platform. Click **Summary Documents** tab from your Product page to access these documents. Click **Download** to access each document.



- 1. RfX Report** – Excel report that includes all information related to the RFP questions and answers for your product
- 2. Survey Summary Report** – Word document that includes a summary of company and product details
- 3. Short Summary** – Word document that includes a high-level summary of the product with limited company information

MercerVIP

Summary Documents

RFx Report

	A	B	C	D	E	F	G	H	I	J	K	L
1	Company Overview											
2												
3	Company name	Mercer Admin										
4												
5	'Contact us' email	mercervip@mercer.com										
6												
7	Website	https://testwebsite.com										
8												
9	Twitter™ name											
10												
11	LinkedIn™ company page URL											
12												
13	Overview	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut										
14												
15	Company key facts											
16												
17	Describe your approach to business continuity with your clients, in the event of a catastrophic event, major outage or pandemic that would prevent you from operating from your offices as normal for more than a day? Please add any attachments as necessary, in the collateral section below											
18												
19	Year Founded	2017										
20												
21	Company Financial Structure	Private										
22												
23	If publicly traded, identify exchange(s) and symbol(s)	N/A										
24												
25	If not publicly traded, indicate your financial stage and the capital invested in your organization or select private											
26												
27	If Other, please describe											
28												
29	If you are able to disclose, please provide a list of your investors											
30												
31	Merger & acquisition activity	N/A										
32												
33	Annual corporate revenues (US\$, FYE 2016)	1000000										
34												
35	Annual corporate revenues (US\$, FYE 2017)	1000000										
36												
37	Company Information	Solution Overview	Solutions	Clinical	Diversity & Inclusion	Solution Cost	Solutions Overview	Target Employer Business Detail	...	+		

Survey Summary Report

Survey Summary Report

Mercer Admin | Tiger Spending Account Test



Mercer Admin

2017



'Contact us' email

mercervip@mercer.com



Website

https://testwebsite.com



Twitter™ name



LinkedIn™ company page URL

Overview


Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Tincidunt praesent semper feugiat nibh sed pulvinar proin gravida hendrerit. Sed sed risus pretium quam vulputate dignissim suspendisse in. Tristique risus nec feugiat in fermentum posuere. Tellus orci ac auctor augue mauris augue neque gravida in. Molestie at elementum eu facilisis sed. Et malesuada fames ac turpis. Elementum sagittis vitae et leo duis ut diam. Nibh praesent tristique magna sit. A pellentesque sit amet porttitor eget. Ac auctor augue mauris augue neque gravida in.

Eu sem integer vitae justo eget magna. Voluptat odio facilisis mauris sit amet massa. Congue eu consequat ac felis donec et. Elementum curabitur vitae nunc sed. In ornare quam viverra orci. Auctor neque vitae tempus quam pellentesque nec. Laoreet sit amet cursus sit amet dictum sit. Augue interdum velit euismod in pellentesque. Est sit amet facilisis magna etiam tempor orci. Nisi suscipit adipiscing bibendum est.

Short Summary Report


Short Summary Report

Mercer Admin | Tiger Spending Account Test



Mercer Admin

Tiger Spending Account Test



Account-Based Services

Limited-purpose Flexible Spending Account (LFSA)

Product Overview

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Key Features

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
- Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Key Benefits

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
- Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Vendor User Management

5

MercerVIP

Team Members

On the **Team Members** page, you can view a list of active and inactive team members and pending invites. From here, Admins can change the permission level for team members. To do this, click the dropdown under permission and update the permission. To add a new member, simply enter their email address in the text box.

1. **Active** – Shows list of active users
2. **Inactive** – Shows list of inactive users. From here, admins can restore access back to inactive users
3. **Pending invites** – Shows list of people who were invited. From here, admins can set permissions or cancel invite
4. **Admin** – User has full access to manager user permissions, edit company information, and respond to RFP opportunities.
5. **Editor** – User has access to edit company and product information and respond to RFPs opportunities but cannot manager user permissions. Note this is the default permission whenever a new user is invited to join
6. **Read-only** – User can only view company and product information but cannot edit that information. User do not have ability to manage permissions.
7. **Message Center Checkbox** – Enable to opt-in to receive notifications from MercerVIP. This is defaulted to enabled (Questions from consultants)
8. **RFP Emails Checkbox** – Enable to opt-in to receive notifications from Proposal Tech (RFP)
9. **Deactivate** – Removes user. Confirm removal and the user is no longer active

Team members

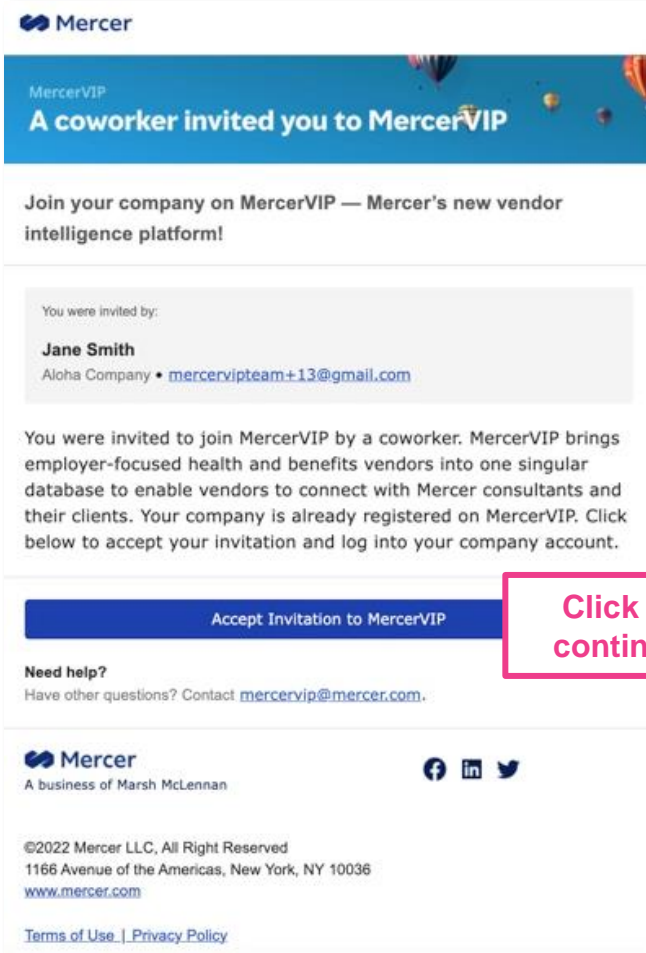
Input colleague's email address to invite them. See next page

Add team member: Enter email address

1 Active • 10	2 Inactive • 6	3 Pending invites • 7					
Name ↕	Email	Permissions ↕	7	8		9	
Mercervip, Mercervip	mercervip@mercer.com	Admin	✓	✓		Deactivate	
Doe, John	mercervipteam+32@gmail.com	Editor	✓	✓		Deactivate	

MercerVIP

Team



After you sent the invite in the previous step, your colleague will receive an email notification which includes information about MercerVIP and link to accept the invite and continue with the registration process.

In the **Pending invites** tab, admins can also change the permissions for the users they have invited to join or cancel the invite

Active • 9			Inactive • 7			Pending invites • 6		
Email		Permissions ↑↓						
samtkennedy@gmail.com		Editor				Cancel		
		✓ Admin						
samtkennedy+testvip30@gmail.com		✓ Editor				Cancel		
		✓ Read-only						
samtkennedy+testvipread33@gmail.com		Read-only				Cancel		

Vendor RFP Management

6

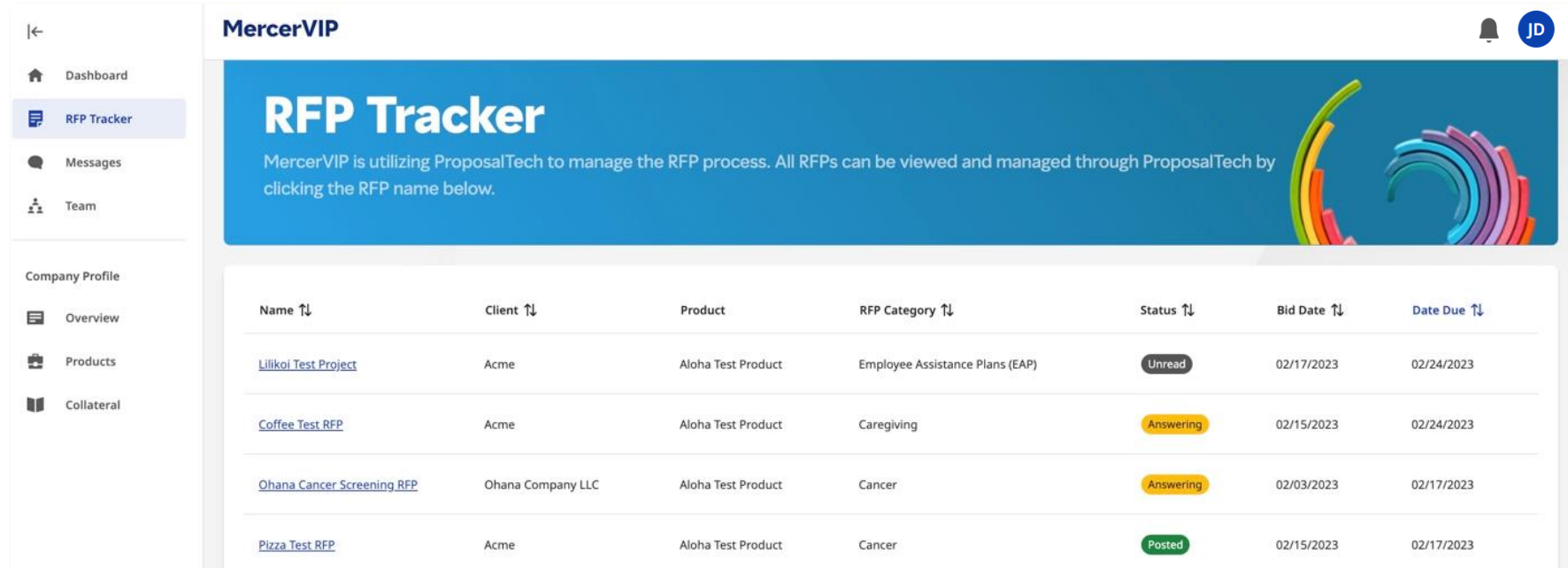
MercerVIP

RFP Tracker

In **RFP Tracker** page, you can view and access the RFPs you have received in the platform. MercerVIP has partnered with an RFP workflow company called **Proposal Tech** to help manage the RFP process. Proposal Tech manages the RFP workflow, notifications and all aspects of the RFP process.

To see additional details and respond to an RFP, click the **Name of RFP** hyperlink. This action will take you to the Proposal Tech platform where you can find more information about the RFP and submit your responses.

See next page.



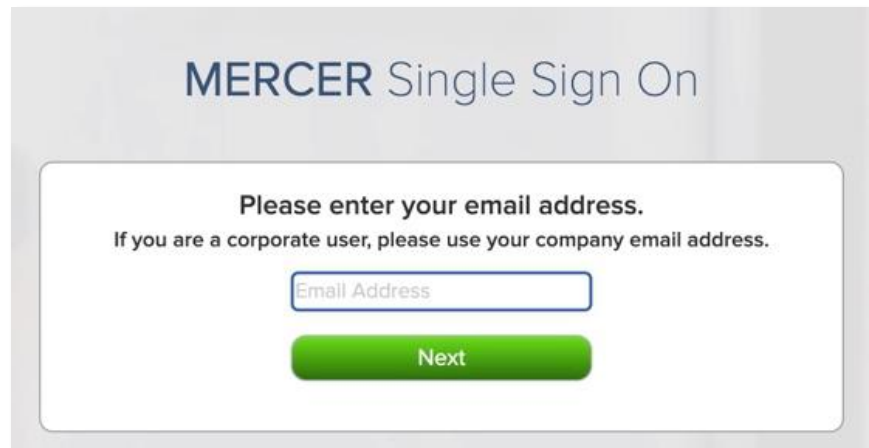
Name ↕	Client ↕	Product	RFP Category ↕	Status ↕	Bid Date ↕	Date Due ↕
Lilikoi Test Project	Acme	Aloha Test Product	Employee Assistance Plans (EAP)	Unread	02/17/2023	02/24/2023
Coffee Test RFP	Acme	Aloha Test Product	Caregiving	Answering	02/15/2023	02/24/2023
Ohana Cancer Screening RFP	Ohana Company LLC	Aloha Test Product	Cancer	Answering	02/03/2023	02/17/2023
Pizza Test RFP	Acme	Aloha Test Product	Cancer	Posted	02/15/2023	02/17/2023

Status	Definition
Unread	Vendor has not opened the RFP
Accepted	Vendor accepts the RFP
Declined	Vendor declines the RFP
Answering	Questions are being answered by the vendor
Posted	Answers are posted by the vendor (RFP is complete)
Removed	Product was removed by the consultant
Closed	RFP is closed by the consultant

MercerVIP

Proposal Tech - SSO

After you click the name of an RFP from the RFP Tracker page, you will be directed to do a one-time registration with Proposal Tech. After this one-time registration, you can SSO directly into Proposal Tech. We have set up a SSO between MercerVIP and Proposal Tech that will log you in to Proposal Tech directly without having to create additional user names and passwords.

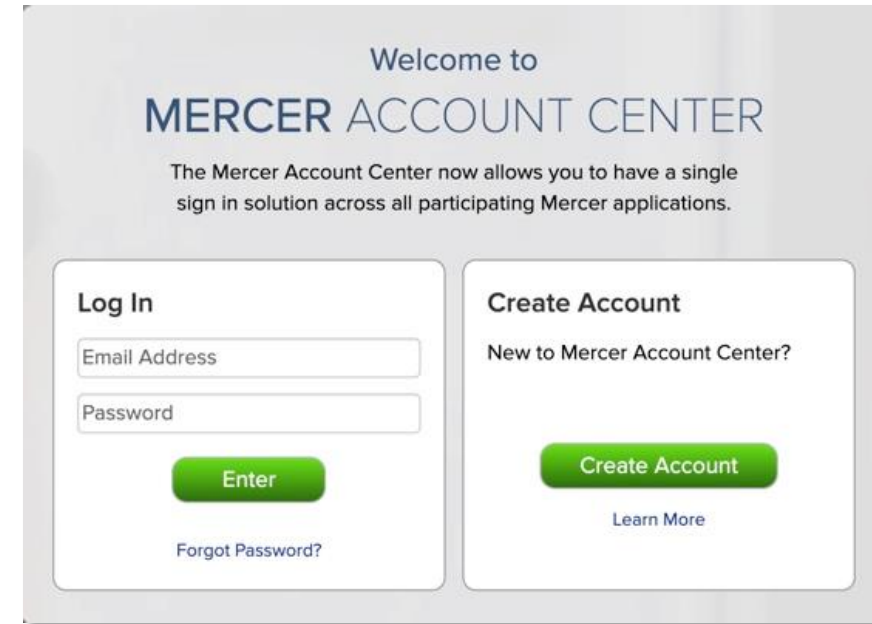


MERCER Single Sign On

Please enter your email address.
If you are a corporate user, please use your company email address.

Next

Make sure you use the same email address
from your MercerVIP profile



Welcome to
MERCER ACCOUNT CENTER

The Mercer Account Center now allows you to have a single
sign in solution across all participating Mercer applications.

Log In

Enter

[Forgot Password?](#)

Create Account

New to Mercer Account Center?

Create Account

[Learn More](#)

Log in with the same credentials and click
Enter. See next page

MercerVIP

Proposal Tech - Verification

MERCER ACCOUNT CENTER

Verify Your Identity

To protect your information, please select a contact method below to receive a one-time verification code.

☒ me*****@**ail.com
Your Verified Email

Message and data rates may apply.

[Send Code](#)

Click Send Code and check your email address for the one-time verification code

MERCER ACCOUNT CENTER English (United States)

✓ Your code has been sent and will arrive shortly.

Verify Your Identity

Please enter the one-time verification code we sent to me*****@**ail.com within 10 minutes.
If you don't see your code, please check your spam folder.

* Verification Code:

[Confirm](#)

[Send a new verification code.](#)

Input Verification Code and Confirm. See next page

MercerVIP

Proposal Tech - Confirm Contact List

After you complete SSO, you will receive an **Alert** to accept or decline the RFP invitation. Before you accept or decline the invitation, you can confirm or modify the primary contact list and assign permissions. The Email permission is specific to this RFP within the Proposal Tech system and includes messages from consultants and RFP status updates. Click **Submit** to continue



Permissions

Please confirm or modify the primary contact listed below.

Primary Contact Smith, <mercervipteam+13@gmail.com>

Existing Users

Smith, Jane <mercervipteam+10@gmail.com>	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Post	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Email
Smith, Jane <mercervipteam+11@gmail.com>	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Post	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Email

MercerVIP

Proposal Tech – Intent to Participate

After clicking **Submit** on the previous step, you will be directed to **Accept** or **Decline** your intent to participate in an RFP. You are also able to add a note with your response.

This screen will also show attachments included in the RFP by the Consultant.

Accept or **Decline** the RFP to move forward.

Note: By accepting the RFP, you are authorized by your company to accept the Proposal Technologies Network, Inc. [Terms of Use](#) and [Privacy Policy](#)

The screenshot shows the MercerVIP interface. On the left is a dark sidebar with navigation links: Home, Invitation Manager, Intent to Participate (highlighted with a green checkmark), Help, Ask Question, and Tech Support. The main content area is titled 'RFP for ABC Company, Aloha Test Product' with a status of 'Not Posted' and a due date of '02/28/23 01:00:00 PM PST'. Below this is a section titled 'Intent to Participate' which contains the text: 'You have been invited to participate in a RFP'. It lists the RFP details: Name: RFP for ABC Company, Solicitor: Mercer VIP, and Regions: Aloha Test Product. A deadline is shown: 'Accept or Decline your intent to participate here by 02/15/23 13:00'. There is a text input field for 'Reply Message (Optional)'. Below the input field are four buttons: 'Accept', 'Decline', 'Assign to Coworker', and 'Cancel'. The 'Accept' and 'Decline' buttons are highlighted with a green border. Below the buttons is a note: 'You may decline responding to the RFP after you have accepted it'. At the bottom, there is a section titled 'Attachments from Mercer VIP:' which contains a table of attachments.

Name	Date	Size
Download/Print Request		
All Attachments for Aloha Test Product (includes all of the following)	02/15/23 16:45:12	16239
Sample Exhibit.xlsx	02/15/23 16:39:35	25134

MercerVIP

Proposal Tech – Intent to Participate

The screenshot on the right is the email the consultant will receive from Proposal Tech after you **accepted** to participate to the opportunity.


Mercer

RFP "RFP for ABC Company", Aloha Test Product
[Go to RFP](#)

Note that the deadline for submitting proposals through this system for RFP for ABC Company is Feb 28, 2023 at 01:00 PM US/Pacific.

Respondent
" Smith" <mercervipteam13_mvip63d40915d854f6c27dfd2d18@rfp1.proposaltech.com>
has **accepted**:
RFP "RFP for ABC Company", Aloha Test Product

Event Status Summary [Never revealed to respondents]

Contact	Company	Variation	Status	Time Stamp	Answered	Attachments
Smith,	Aloha Company	Aloha Test Product	Answering		1% (2/318)	No

For more information, please contact the event coordinator. We look forward to assisting you with your project.

Best Regards,
MercerVIP

Note: Replies to this email must include [108266885] in the subject.

Note that the deadline for submitting proposals through this system for RFP for ABC Company is Feb 28, 2023 at 01:00 PM US/Pacific. To access the RFP, please login to MercerVIP through the [MercerVIP MercerLink](#) site and click into the application. To access the RFP within MercerVIP, find the RFP on the dashboard or click on RFP tracker in the left navigation, navigate to the correct RFP and click View in ProposalTech from the actions drop down. For detailed training material, access Mercer Link: [MercerVIP Mercer Link](#). For all questions, please contact us at MercerVIP@mercer.com.

This message and any attachments are considered to be confidential and proprietary. If you are not the intended recipient, please delete this email. Any use of this email, its content or attachments by any other person other than the intended recipient is strictly prohibited.

MercerVIP

Proposal Tech – Summary

After accepting the RFP, click **Summary** to find more details about the RFP. In this page, you can find:

1. **Due Date** – Due date of RFP
2. **Question deadline (if applicable)** – Deadline to submit questions to consultant
3. **Q&A answer availability (if applicable)** – Date when responses to your questions become available
4. **Primary Contact** – Your contact for this RFP
5. **Print** – Download a Word copy of the RFP (see slide 59 to download an excel version)
6. **Team** – Change permissions and primary contact
7. **Tutorial** – Video tutorial of Proposal Tech
8. **Answer** – Explore and respond to RFP questions

In this page, you can also find the consultant and their contact information under **Sender**.

Click **Answer** to move forward

The screenshot displays the MercerVIP Proposal Tech interface. On the left is a dark sidebar with navigation options: Home, Invitation Manager, Intent to Participate, Summary (highlighted with a green house icon), RFP Manager, Table of Contents, Manage Documents, Edit Response, Messaging/History, Reports / Print, Standard, Tabular, Actions, Post Answers, Change Permissions, Help, Ask Question, and Tech Support. The main content area is titled 'RFP for ABC Company, Aloha Test Product' with status 'Not Posted' and due date '02/28/23 01:00:00 PM PST'. Below this is the 'Invitation Manager' section showing 'Questions: 318', 'Answers: 2', and '0.6% answered'. A numbered list of actions follows: 1. Due Date (Feb 28, 2023), 2. Question deadline (Feb 21, 2023), 3. Q&A answer availability (February 23, 2023), 4. Primary Contact (Smith), 5. Print (Print this RFP from Word), 6. Team (Set Permissions), 7. Tutorial (View a Quick Tutorial), and 8. Answer (Navigate the Table of Contents), which is circled in green. The 'Sender' section at the bottom lists details for John Doe from Mercer VIP, including a system email and a real email.

Home
Invitation Manager
✓ Intent to Participate
🏠 Summary
RFP Manager
Table of Contents
Manage Documents
Edit Response
Messaging/History
Reports / Print
Standard
Tabular
Actions
Post Answers
Change Permissions
Help
Ask Question
Tech Support

RFP for ABC Company, Aloha Test Product
Status: *Not Posted* | Due: 02/28/23 01:00:00 PM PST

Invitation Manager
Questions: **318** Answers: **2** 0.6% answered

- 1 **Due Date:** Feb 28, 2023 at 01:00 PM US/Pacific
- 2 **Question deadline:** Feb 21, 2023 at 12:00 AM US/Pacific
- 3 **Q&A answer availability:** February 23, 2023 US/Pacific
- 4 **Primary Contact:** Smith [Change](#)
- 5 **Print** **Print this RFP from Word.**
- 6 **Team** **Set Permissions.** Grant access to team members or change the primary contact.
- 7 **Tutorial** **View a Quick Tutorial**
- 8 **Answer** **Navigate the Table of Contents.** (Use the Summary link to return here.)

Sender:

Name	John Doe
Company	Mercer VIP
Phone	
System Email	"John Doe" (johndoe_mercervip@rfp1.proposaltech.com> (Emails must include [108266885] in the subject.)
Real Email	john.doe@mercer.com

MercerVIP

Proposal Tech – Table of Contents

In **Table of Contents**, you can see

- **Introduction section** – Description of the RFP
- **Questions from MercerVIP** – Questions that you have responded in MercerVIP platform
- **Pricing Questions (if applicable)**
- **Performance Guarantees Questions (if applicable)**
- **Client Specific Questions (if applicable)**

From this page, you can click a section which will take you the questions where you can update your existing responses or respond to a new question. You can also respond to questions when you click **Edit Response** in the left panel.

The screenshot displays the MercerVIP interface. On the left is a dark sidebar with a menu. The 'Edit Response' option, represented by a pencil icon, is circled in green. The main content area shows a test titled 'Test Training Material Update Dec 2023 Take 2, Tiger Spending Account Test' with a status of 'Not Posted' and a due date of '12/15/23 01:00:00 PM PST'. Below this, a summary bar indicates 'Questions: 387', 'Answers: 177', and '45.7% answered'. A 'Due Dates' section shows 'Dec 15, 2023 at 01:00 PM US/Pacific'. The 'Table of Contents' lists sections such as '1 Introduction', '2 From Mercer VIP', and '2.1 Company Level Questions', each with a corresponding 'Answers / Questions' count on the right. For example, '2.1.1 Company key facts' has '8 Answers / 16 Questions'.

Note: All questions from MercerVIP will show as answered. You are still able to modify each question as needed.

MercerVIP

Proposal Tech – Manage Documents

In **Manage Documents**, you can access and download attachments the consultant have included in the RFP. From here, you can also upload relevant attachments as part of your submission to the RFP.

The screenshot displays the MercerVIP web application interface. On the left is a dark sidebar with navigation options: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, **Manage Documents** (highlighted with a green box), Edit Response, Messaging/History, Reports / Print, Standard, and Tabular. The main content area is titled 'RFP for ABC Company, Aloha Test Product' with a status of 'Not Posted' and a due date of '02/28/23 01:00:00 PM PST'. Below the title, there is a section 'Add New Attachments' with an 'Upload Attachments' button. A message states: 'Click the button below to upload attachments. This screen will automatically be refreshed after your upload is completed.' Below this is a section 'Your attachments as part of this response' which says 'No documents are attached as part of this response.' Further down is a section 'Attachments from Mercer VIP' containing a table with columns 'Name', 'Date', and 'Size'.

Name	Date	Size
All Attachments for Aloha Test Product (includes all of the following)	02/15/23 16:45:12	16239
Sample Exhibit.xlsx	02/15/23 16:39:35	25134

MercerVIP

Proposal Tech – Edit Response

In **Edit Response**, you can walk through each question set and update or respond to the questions. All of the question sets should be completed in full (if questions are not applicable, leave blank or input N/A).

The screenshot displays the MercerVIP 'Edit Response' interface. On the left is a dark sidebar with navigation options: Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, Edit Response (highlighted in green), Messaging/History, Reports / Print, and Standard. The main content area has a header with a filter dropdown, a summary bar showing 'Questions: 387', 'Answers: 177', and '45.7% answered', and a 'Data Sources' dropdown. Below this is a list of question sections: '+ 1 Introduction', '+ 2 From Mercer VIP' (with a progress bar for '177 Answers / 387 Questions'), '+ 2.1 Company Level Questions' (with a progress bar for '11 Answers / 20 Questions'), and '- 2.1.1 Company key facts' (with a progress bar for '8 Answers / 16 Questions'). The selected section, '2.1.1.1 Describe your approach to business continuity...', includes a text input field and a 'Save All' button. At the bottom, there are four tabs: 'ATTACHMENTS' (labeled 1), 'PAST ANSWERS' (labeled 2), 'FLAGS & COMMENTS' (labeled 3), and 'Q&AS/NOTICES' (labeled 4). A green box highlights these tabs and the 'Save All' button (labeled 5). Additionally, green numbers 6 and 7 are placed above the 'Next' and 'Show' buttons in the top right corner of the main content area.

1. **Attachments** – Upload supporting attachment to the question
2. **Past Answers** – Show previous answer to the question
3. **Flags & Comments** – Add a flag to review a question and/or add new comment
4. **Q&A** – Add any questions for the consultant regarding the RFP during the Q&A window
5. **Save All** – Save your edits (**Click Save All** after updating each section)
6. **Next** – Go to the next unanswered question
7. **Show** – Highlight which questions have no answers

MercerVIP

Proposal Tech – Post Answers

Once you are ready to submit the RFP back to the consultant, go to **Post Answers**. If any questions are missed, you will see a notification informing you some responses are incomplete. If the RFP is posted, you will not be able to complete those sections without the consultant unposting the RFP. Click **Post Response** to submit the RFP. A notification is sent to the consultant that the responses to the RFP have been posted.

The screenshot shows the MercerVIP interface for posting an RFP response. On the left, a dark sidebar contains a menu with items like Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, Edit Response, Messaging/History, Reports / Print, Standard, Tabular, Actions, **Post Answers** (circled in green), Change Permissions, Help, Ask Question, and Tech Support. A green arrow points from the 'Post Answers' menu item to the 'Post Response' button on the main form.


The main form is titled 'Post RFP for ABC Company' and shows the RFP details: 'RFP for ABC Company, Aloha Test Product', Status: *Not Posted*, Due: 02/28/23 01:00:00 PM PST. A warning message states: 'Warning: Your answers are currently incomplete. Posting the entire response would prevent you from completing those answers without unposting. Posting causes a notification to be emailed to the solicitor. You may include additional text in the email by filling in the box below:'. Below the warning is a text input field and two buttons: 'Post Response' and 'Cancel'.

An 'ALERT(S)' pop-up window is displayed, showing a confirmation message: '11:59:59am Posted. (System time: 11:59:59 Feb 16, 2023 US/Pacific)'.

MercerVIP

Proposal Tech – Post Answers

The screenshot on the right is the email consultant will receive from Proposal Tech after you post your responses.


Mercer

RFP "RFP for ABC Company"

[Go to RFP](#)

Note that the deadline for submitting proposals through this system for RFP for ABC Company is Feb 28, 2023 at 01:00 PM US/Pacific.

The Consultant for RFP "RFP for ABC Company" has **POSTED** the RFP.

Event Status Summary [Never revealed to respondents]

Contact	Company	Variation	Status	Time Stamp	Answered	Attachments
Smith,	Aloha Company	Aloha Test Product	Unread		N/A	No

For more information, please contact the event coordinator. We look forward to assisting you with your project.

Best Regards,
MercerVIP

Note: Replies to this email must include [108266885] in the subject.

Note that the deadline for submitting proposals through this system for RFP for ABC Company is Feb 28, 2023 at 01:00 PM US/Pacific. To access the RFP, please login to MercerVIP through the [MercerVIP MercerLink](#) site and click into the application. To access the RFP within MercerVIP, find the RFP on the dashboard or click on RFP tracker in the left navigation, navigate to the correct RFP and click View in ProposalTech from the actions drop down. For detailed training material, access Mercer Link: [MercerVIP Mercer Link](#). For all questions, please contact us at MercerVIP@mercer.com.

This message and any attachments are considered to be confidential and proprietary. If you are not the intended recipient, please delete this email. Any use of this email, its content or attachments by any other person other than the intended recipient is strictly prohibited.

MercerVIP

Proposal Tech – Messaging/History

In **Messaging/History**, you can see a history of messages that were generated from Proposal Tech. You can also send messages through this page.

The screenshot displays the MercerVIP web application interface. On the left is a dark sidebar with navigation links: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, Edit Response, Messaging/History (selected), Reports / Print, Standard, Tabular, Actions, Post Answers, Change Permissions, Help, Ask Question, and Tech Support. The main content area is titled 'RFP for ABC Company, Aloha Test Product' with a status of 'Not Posted' and a due date of '02/28/23 01:00:00 PM PST'. Below this is the 'Messaging Center' with tabs for New, Inbox (selected), Outbox, Sent, Drafts, and Events. A table lists messages with columns for User and Date. The selected message is '[108266885] Smith of Aloha Company accepted RFP "RFP for ABC Company", Aloha Test Product' dated '02-15 17:20:07'. The message content shows the Mercer logo, the RFP title, a 'Go to RFP' button, and a note about the submission deadline.

RFP for ABC Company, Aloha Test Product
Status: *Not Posted* | Due: 02/28/23 01:00:00 PM PST

Smith

Messaging Center

+ New **Inbox** Outbox Sent Drafts Events

All Items No Filter

User	↓↑ Date
System Generated	17:20
[108266885] Smith of Aloha Company accepted RFP "R...	
System Generated	16:45
[108266885] RFP "RFP for ABC Company", Aloha Test Pr...	

[108266885] Smith of Aloha Company accepted RFP "RFP for ABC Company", Aloha Test Product 2023-02-15 17:20:07

This is a system generated email regarding event 108270094

Mercer

RFP "RFP for ABC Company", Aloha Test Product

[Go to RFP](#)

Note that the deadline for submitting proposals through this system for RFP for ABC Company is Feb 28, 2023 at 01:00 PM US/Pacific.

MercerVIP

Proposal Tech – Standard Reports

In **Standard** report, you can generate a Word copy of the RFP questions and responses. You can filter by section and by other criteria. Click **Generate Report** to get a copy.

Home
Invitation Manager
✓ Intent to Participate
Summary
RFP Manager
Table of Contents
Manage Documents
Edit Response
Messaging/History
Reports / Print
Standard
Tabular
Actions
Post Answers
Change Permissions
Help
Tech Support

Test Training Material Update Dec 2023 Take 2, Tiger Spending Account Test
Status: *Not Posted* | Due: 12/15/23 01:00:00 PM PST

John Doe

Data Sources

Generate Standard Report

Customize your report below and then click "Generate Report". The resulting report can be opened with Microsoft Word. Word can be used to print or spell check the report. Any corrections to answers must be made online. Changes in Word are not saved to the system and a Word document cannot be imported.

Is the report audience internal or external?

☐ **External** - This is the same as the report that is automatically provided to the solicitor upon posting.

☒ **Internal** - Internal reports include additional details, such as the maximum number of words allowed for responses (when applicable) and internal comments. The content of the report is very similar to the web pages used to provide answers.

Would you like a filtered report? (Leave checkboxes blank for no filtering)

☐ **Answered** - Only answered questions are included.

☐ **Flagged** - Only questions/answers are included that are marked or not marked with the flags indicated below.

Select Marked	Exclude Marked	Flag Name
<input type="checkbox"/>	<input type="checkbox"/>	Needs Review

☐ **Unanswered** - Only unanswered questions are included.

☐ **Questions** - Only portions requiring a response are included.

☐ **Only Tables** - Only table questions are included.

Sections ([Show Questions](#))

☒ **All Sections**

- ☐ 1 Introduction
- ☐ 2 From Mercer VIP
 - ☐ 2.1 Company Level Questions
 - ☐ 2.1.1 Company key facts
 - ☐ 2.1.2 Company Funding Status
 - ☐ 2.2 Product Specific Questions
 - ☐ 2.2.1 Clinical
 - ☐ 2.2.1.1 Discovery Questions
 - ☐ 2.2.1.2 RFX Questions
 - ☐ 2.2.1.2.1 Clinical Structure
 - ☐ 2.2.1.2.2 Clinical Process
 - ☐ 2.2.2 Diversity & Inclusion
 - ☐ 2.2.2.1 Discovery Questions
 - ☐ 2.2.2.2 RFX Questions
 - ☐ 2.2.3 Solution Cost
 - ☐ 2.2.3.1 Discovery Questions

MercerVIP

Proposal Tech – Tabular Reports

In **Tabular** report, you can generate an Excel copy of the RFP questions and responses. You can filter by section and by other criteria. Click **Generate Report** to get a copy.

The screenshot displays the MercerVIP web application interface. On the left is a dark sidebar with navigation links: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, Edit Response, Messaging/History, Reports / Print, Standard, **Tabular** (highlighted with a green circle), Actions, Post Answers, Change Permissions, Help, and Tech Support. The main content area is titled 'Test Training Material Update Dec 2023 Take 2, Tiger Spending Account Test' with status 'Not Posted' and a due date of '12/15/23 01:00:00 PM PST'. Below the title is a 'Select Report' section with three columns of options: Information, Responses, and Sections. The 'Information' column includes options for 'Answers' (Track changes against defaults, Include answer details, Details in separate column, Include date posted, Exclude answers) and 'Tables' (Only tables, Include table cells as tables, Exclude table cell details). The 'Responses' column has a single option: 'Mercer Admin, Tiger Spending Account Test (Mercervip Mercervip) Answering'. The 'Sections' column has a checked 'All Sections' option and a list of other sections. The 'Feedback / Second Round' section includes options for 'Include archives' and 'Archive comments in separate column'. The 'Brevity' section includes options for 'Exclude N/A questions', 'Exclude all questions (and answers)', and a 'Flagged' table. The 'Attachments' section includes an option for 'Only questions with answers with attachments'.

Home
Invitation Manager
✓ Intent to Participate
Summary
RFP Manager
Table of Contents
Manage Documents
Edit Response
Messaging/History
Reports / Print
Standard
Tabular
Actions
Post Answers
Change Permissions
Help
Tech Support

Test Training Material Update Dec 2023 Take 2, Tiger Spending Account Test
Status: *Not Posted* | Due: 12/15/23 01:00:00 PM PST

Select Report

Information

Answers

- ☐ Track changes against defaults
- ☒ Include answer details
- ☐ Details in separate column
- ☐ Include date posted
- ☐ Exclude answers

Tables

- ☐ Only tables
- ☐ Include table cells as tables
- ☐ Exclude table cell details

Feedback / Second Round

- ☐ Include archives
- ☐ Archive comments in separate column

Brevity

- ☒ Exclude N/A questions
- ☐ Exclude all questions (and answers)
- ☐ Flagged

Select	Exclude	Flag Name
Marked	Marked	
<input type="checkbox"/>	<input type="checkbox"/>	Needs Review

- ☐ Only questions with answers updated since US/Pacific

Attachments

- ☐ Only questions with answers with attachments

Responses

- ☐ Mercer Admin, Tiger Spending Account Test (Mercervip Mercervip) Answering

Sections (Show Questions)

- ☒ All Sections
- ☐ 1 Introduction
- ☐ 2 From Mercer VIP
- ☐ 2.1 Company Level Questions
- ☐ 2.1.1 Company key facts
- ☐ 2.1.2 Company Funding Status
- ☐ 2.2 Product Specific Questions
- ☐ 2.2.1 Clinical
- ☐ 2.2.1.1 Discovery Questions
- ☐ 2.2.1.2 RFX Questions
- ☐ 2.2.1.2.1 Clinical Structure
- ☐ 2.2.1.2.2 Clinical Process
- ☐ 2.2.2 Diversity & Inclusion
- ☐ 2.2.2.1 Discovery Questions
- ☐ 2.2.2.2 RFX Questions
- ☐ 2.2.3 Solution Cost
- ☐ 2.2.3.1 Discovery Questions
- ☐ 2.2.4 Solutions Overview
- ☐ 2.2.4.1 Discovery Questions
- ☐ 2.2.4.2 RFX Questions
- ☐ 2.2.5 Target Employer Business Details
- ☐ 2.2.5.1 Discovery Questions
- ☐ 2.2.6 User Experience

MercerVIP

Proposal Tech – Change Permissions

In **Change Permissions**, you can change the primary contact and change the permissions for existing users. Note: This change will only apply to this RFP.

The screenshot shows the 'Change Permissions' page in MercerVIP. The left sidebar contains navigation links: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, Edit Response, Messaging/History, Reports / Print, Standard, Tabular, Actions, Post Answers, Change Permissions (highlighted), Help, Ask Question, and Tech Support. The main content area is titled 'RFP for ABC Company, Aloha Test Product' with status 'Not Posted' and due date '02/28/23 01:00:00 PM PST'. Below this is a 'Permissions' section with a red 'Updated Test Pi' button. The instructions state: 'Please confirm or modify the primary contact listed below. In addition, please review and/or edit user permissions for your organization here. These edits will apply only for this RFP. Note that all users on this page have view rights for the RFP, regardless of which boxes are checked.' The 'Primary Contact' is set to 'Smith, <mercervipteam+13@gmail.com>'. Under 'Existing Users', there are two entries: 'Smith, Jane <mercervipteam+10@gmail.com>' and 'Smith, Jane <mercervipteam+11@gmail.com>'. Each entry has checkboxes for 'Edit', 'Post', 'Admin', and 'Email'. The first user has 'Edit', 'Post', and 'Email' checked. The second user has 'Email' checked. A 'Submit' button is at the bottom left of the permissions section.

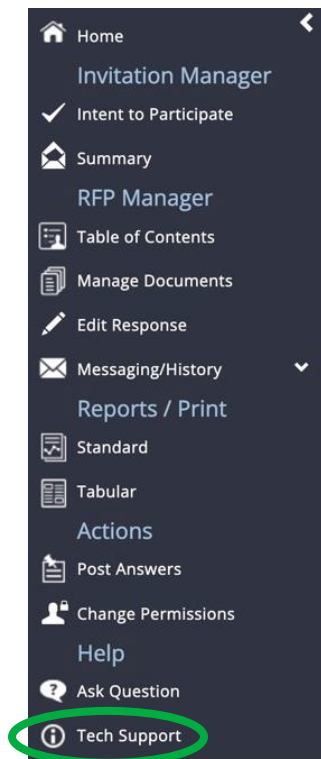
Permissions				
Please confirm or modify the primary contact listed below.				
In addition, please review and/or edit user permissions for your organization here. These edits will apply only for this RFP. Note that all users on this page have view rights for the RFP, regardless of which boxes are checked.				
Primary Contact	Smith, <mercervipteam+13@gmail.com>			
Existing Users	Smith, Jane <mercervipteam+10@gmail.com>	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Post	<input type="checkbox"/> Admin <input checked="" type="checkbox"/> Email
	Smith, Jane <mercervipteam+11@gmail.com>	<input type="checkbox"/> Edit	<input type="checkbox"/> Post	<input type="checkbox"/> Admin <input checked="" type="checkbox"/> Email
<input type="button" value="Submit"/>				

***Note:** To change permissions for all future RFPs, please visit the team members section in MercerVIP. To add new users to this RFP, please add them via the Team Member section in MercerVIP

MercerVIP

Proposal Tech – Tech Support

In **Tech Support**, you can send tech questions or concerns to the Proposal Tech support team. Note if you have questions about the RFP, please reach out to the consultant.

A screenshot of the 'REPORT A PROBLEM' form. The form has a title bar with a close button. The main text reads: 'To ensure that we can address any problems that you discover quickly and efficiently, please describe the problem in detail, including what you were doing just before the problem occurred and any error messages the system displayed. Support staff are also available to assist you by email at support@proposaltech.com and by phone at (877)211-8316, option 4.' The form contains a 'Subject' text input field, a 'Describe Problem' text area, a checkbox labeled 'Yes, it's okay to contact me', a 'Phone' text input field, and a 'Submit' button.

Note: You can also email or call Proposal Tech for technical support questions. support@proposaltech.com or (877)211-8316, option 4.

MercerVIP

Proposal Tech – UnPost

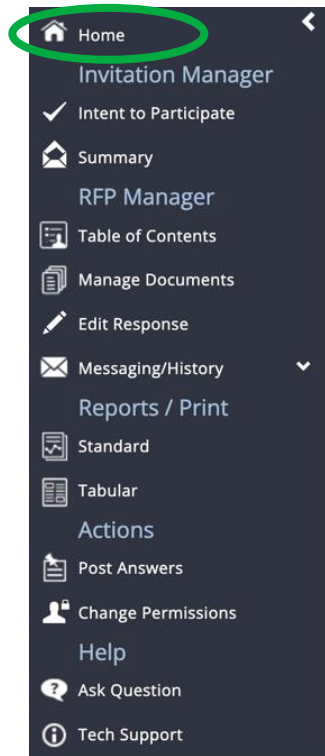
Once you have posted your responses, you can also **UnPost** them to make them invisible to the consultant unless the RFP is locked or been archived by the consultant.

The screenshot displays the MercerVIP user interface. On the left is a dark sidebar with a list of navigation items: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, View Response, Messaging/History, Reports / Print, Standard, Tabular, Actions, UnPost, Change Permissions, Help, Ask Question, and Tech Support. The 'UnPost' item is highlighted with a green rectangular box. The main content area on the right shows a confirmation dialog for unposting a response. It contains the following text: 'Unposting the response makes all answers invisible to the solicitor unless they are locked or have been archived by the solicitor. Changes to answers would not be visible until the answers have been posted again. Unposting causes a notification to be emailed to the solicitor. You may include additional text in the email by filling in the box below:'. Below this text is an empty text input field. At the bottom of the dialog are two buttons: 'Unpost Response' and 'Cancel'. The 'Unpost Response' button is circled with a green oval.

MercerVIP

Proposal Tech – Home

In the Home page, you are able to see a list of all RFPs you have received in the MercerVIP platform. You can open the RFP by clicking **View** associated to the RFP. You can see the receipt date, due date, status completion and number of answered questions for each RFP.



Home									
— New Invitations (1)									
View	Type	Solicitor	Title			Received	Due Date(s)		
View	RFP	Mercer VIP	Lilikoi Test Project, Aloha Test Product			02/15/23	02/24/23		
— In Progress Responses (7)									
View	Type	Solicitor	Title	Owner		Received	Due Date(s)	Status	A/Q
View	RFP	Mercer VIP	Cancer Screening Quote, Aloha Test Product	mercervipteam13		01/27/23	02/08/23	Answering	5/274
View	RFP	Mercer VIP	Cancer Management RFP, Aloha Test Product	mercervipteam13		01/30/23	02/08/23	Accepted	0/299
View	RFP	Mercer VIP	Shark's Cove Test Project, Aloha Test Product	mercervipteam13		02/06/23	02/07/23	Accepted	0/299
View	RFP	Mercer VIP	Coffee Test RFP, Aloha Test Product	mercervipteam13		02/15/23	02/24/23	Answering	2/299
View	RFP	Mercer VIP	Ohana Cancer Screening RFP, Aloha Test Product	mercervipteam13		01/31/23	02/17/23	Answering	0/318
View	RFP	Mercer VIP	Musubi Test Product, Aloha Test Product	mercervipteam13		02/01/23	02/10/23	Accepted	0/299
View	RFP	Mercer VIP	Pele's Test Product, Aloha Test Product	mercervipteam13		02/02/23	02/10/23	Answering	1/298
— Recently Posted Responses (4)									
View	Type	Solicitor	Title	Owner		Received	Due Date(s)	Status	A/Q
View	RFP	Mercer VIP	RFP for ABC Company, Aloha Test Product	mercervipteam13		02/15/23	02/28/23	Posted	2/318
View	RFI	Mercer VIP	Updated Test Pizza, Aloha Test Product	mercervipteam13		02/15/23	02/17/23	Posted	17/307
View	RFP	Mercer VIP	Ohana Cancer Screening RFP 2, Aloha Test Product	mercervipteam13		01/31/23	02/10/23	Posted	0/322
View	RFP	Mercer VIP	Ethan Aloha Test RFP, Aloha Test Product	mercervipteam13		01/31/23	02/01/23	Posted	0/297
+ Old Responses Due more than 45 days ago (0)									

Reset password

MercerVIP

Reset password

1. Enter your email to direct you to the password box
2. Click on Forgot Password
3. Enter your email to receive the reset password link and hit Continue
4. Click on “Create a new password” on the email you receive
5. Create a new password you’ve never used before and click on Continue. You’ll get the message that the reset password process is completed

① Your email address or password is incorrect. Please try again or reset your password.

Mercer VIP

If your company is not registered, please reach out to mercervip@mercer.com for an invitation to join MercerVIP.

Email

Submit

1

Password

Forgot password?

Log In

2

Forgot Password

Enter the email address associated with your account

Email*

Email

Note: If you enter a wrong email, you'll get an Internal failure message

Forgot Password

A link to reset your password has been sent to your email address.

Cancel

Continue

MercerVIP Reset your password

We have received a request to reset your password for the Mercer Account Center. To reset your password and access your account, please click the link below:

[Create new password](#)

Click Here

If clicking the link doesn't work, please copy and paste the link below into a new web browser window instead:

<https://main.mercervip.euw1.dev.ext.mercer.com/mso/reset-password-verify/?VerificationID=7ae6d034-cc5c-43a0-9e60-d7ae4e60d5cf>

For your security, the link is valid for the next 48 hours. Please reach out to mercervip@mercer.com for general questions.

If you did not request to have your password reset, you can ignore this email. Rest assured your account is safe.

MercerVIP Team



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Reset Password

Passwords must meet the following criteria: No previously used passwords Minimum of 8 characters in length Upper and lower case characters At least one numeric value(0 – 9) One or more special characters

Enter a password

Password*

Confirm your password

Confirm Password*

Cancel

Continue

Reset Password

Thank you, your new password has been set.

Cancel

Log In

5

4

Questions?

Please reach out to mercervip@mercer.com
[Or visit the MercerVIP Vendor Website](#)

welcome to
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