

Mercer Vendor Intelligence Portal (MercerVIP)

# Overview & Training

December 2023

A business of Marsh McLennan



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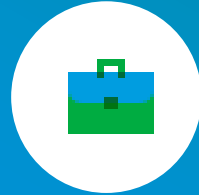
# Mercer VIP Overview





## 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

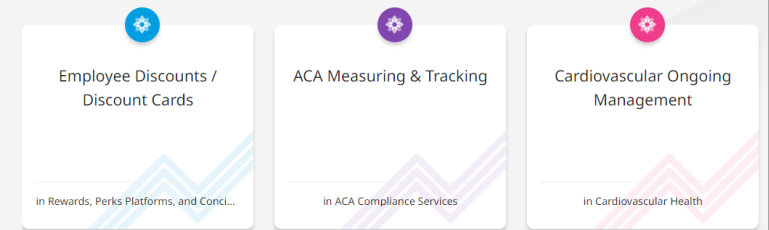
## Explore solutions

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



Trending

Quicksearch

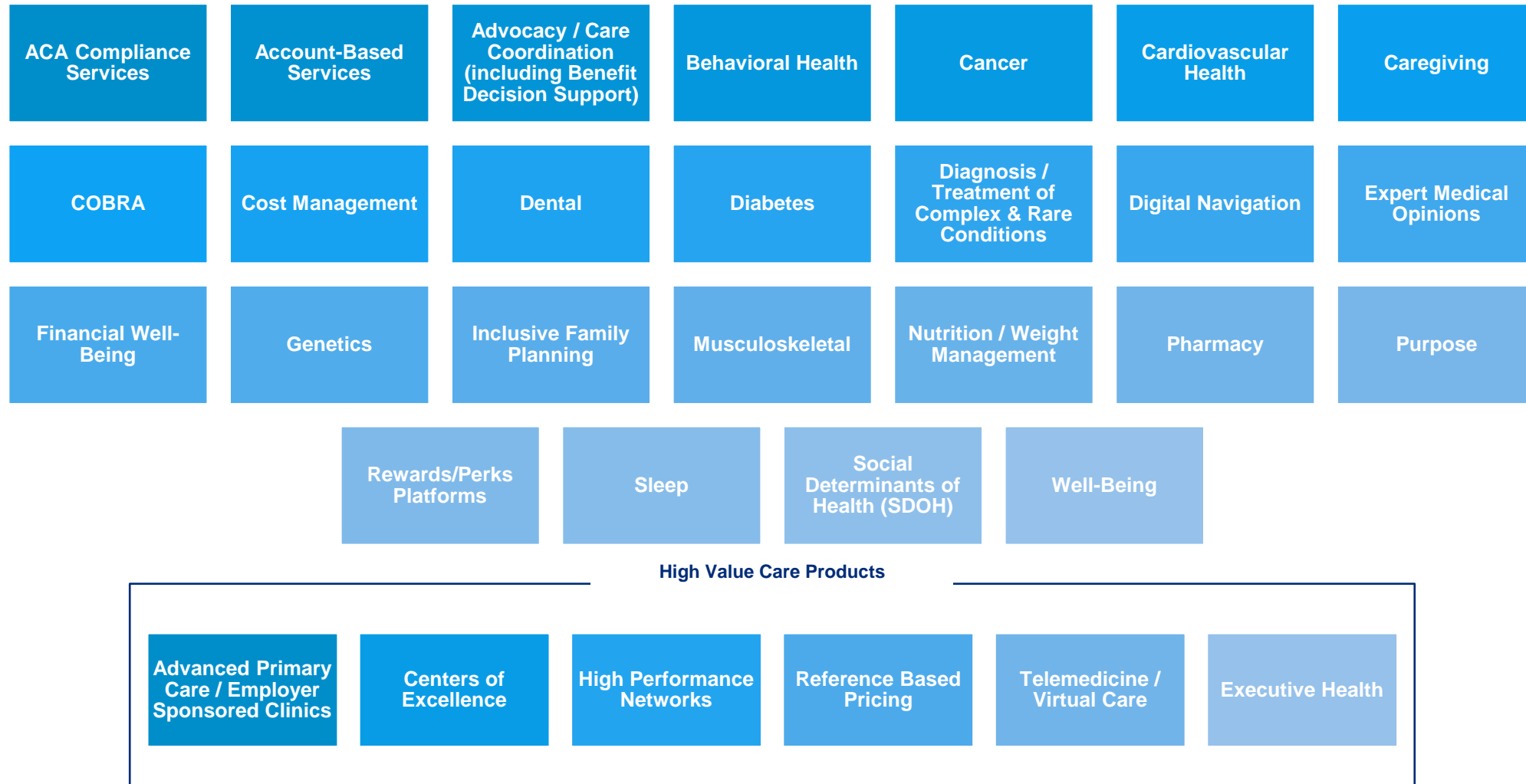


**MercerVIP** improves the quality, quantity, and consistency of the vendor information you have access to, in one place.

# MercerVIP Product Categories

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

The categories below reflect the employer-facing products in scope for **MercerVIP**



# MercerVIP

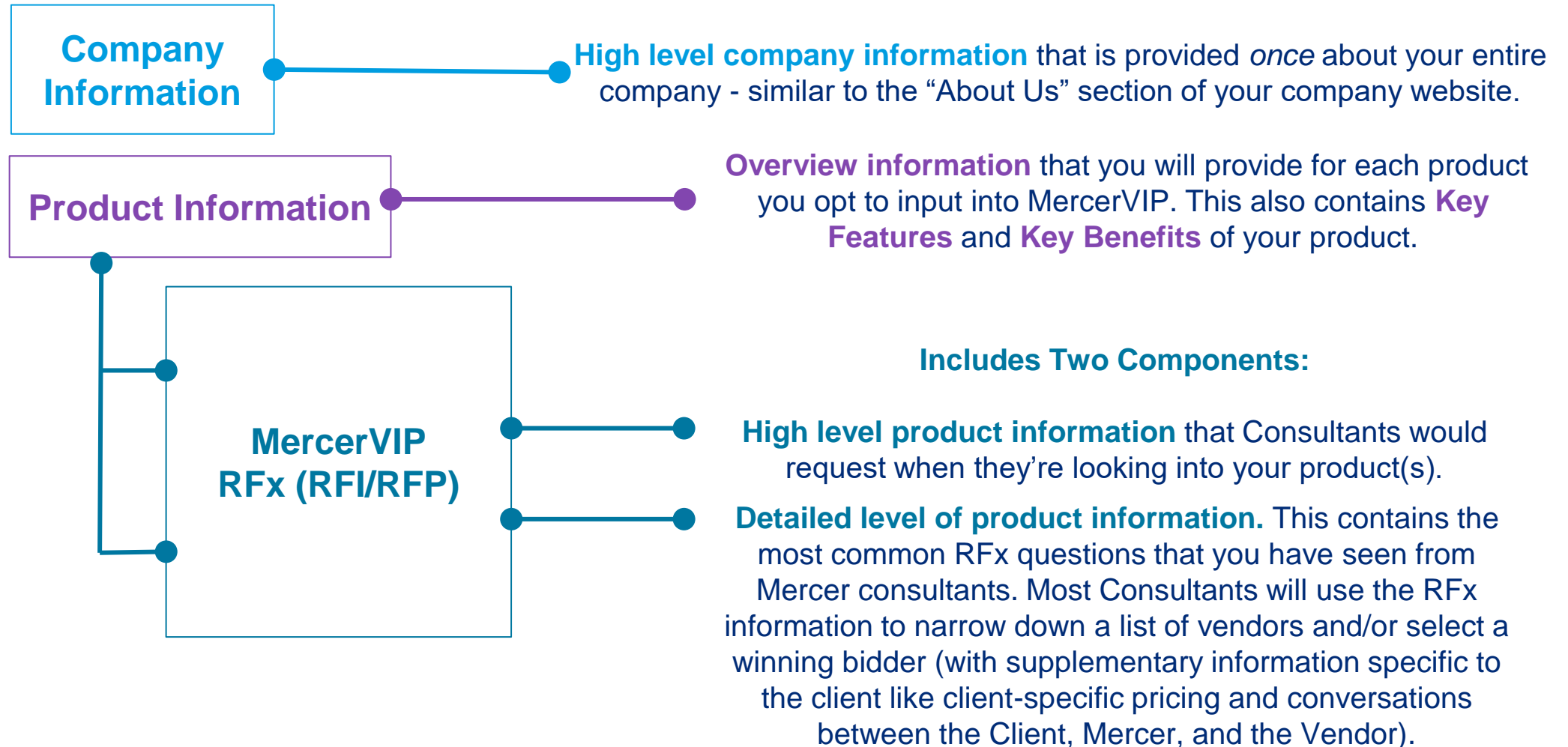
## Product Information

MercerVIP contains questions in the below topic areas



# MercerVIP

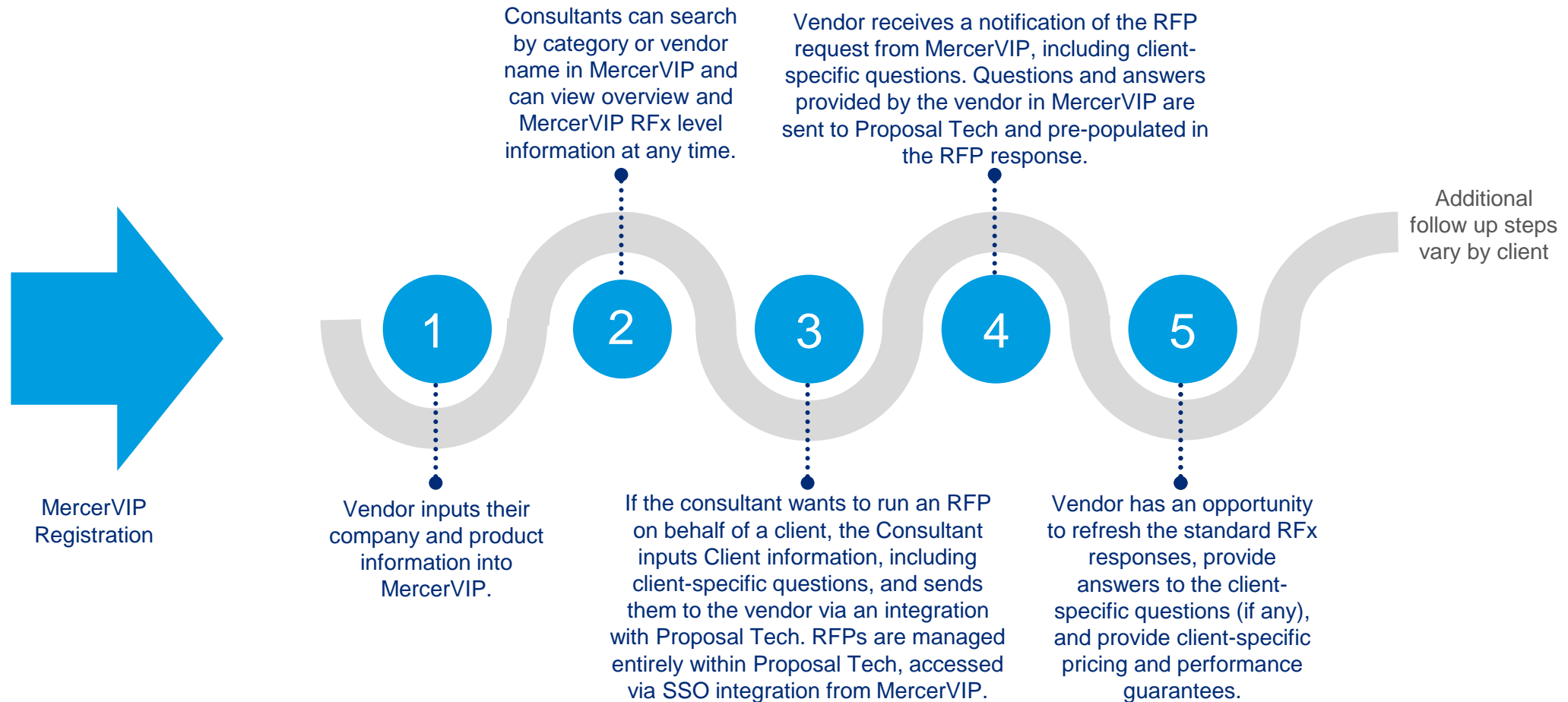
## Data Structure





# 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.

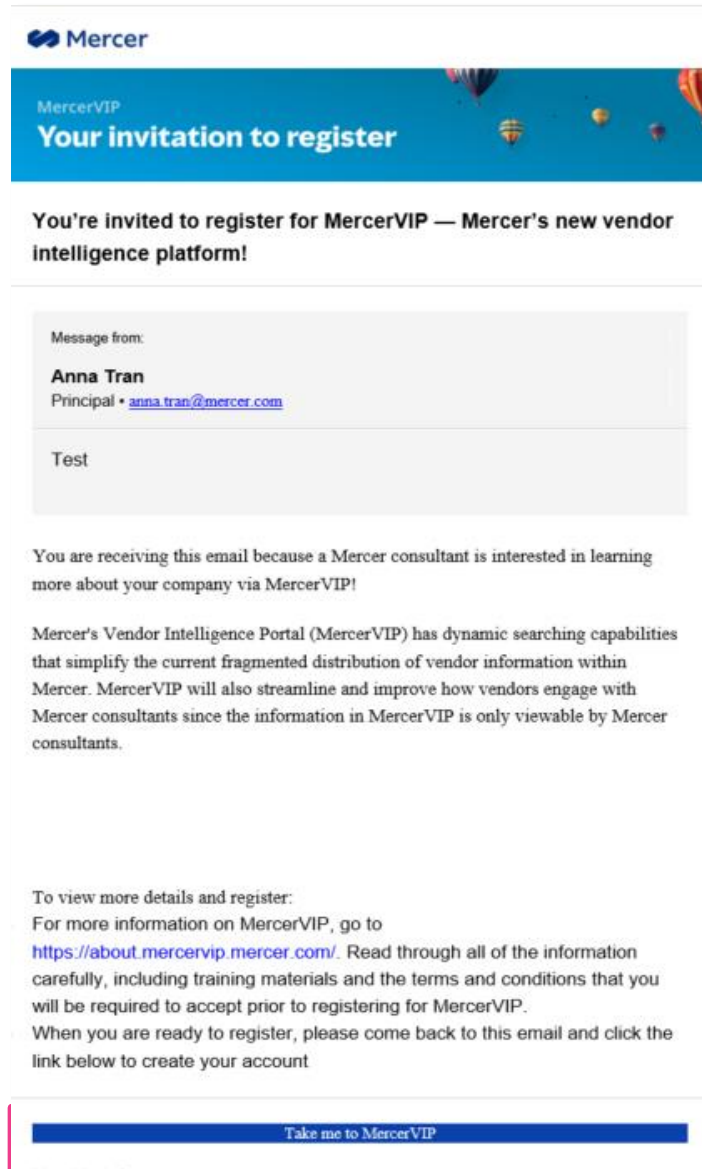
In the event of a conflict between this document and the Terms & Conditions available on [mercervip.mercer.com](https://mercervip.mercer.com), the Terms & Conditions (Terms of Use and Privacy Policy) will govern.

# Vendor Registration and Login



# 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](mailto:mercervip@mercer.com) with your company name, your name, and email address.

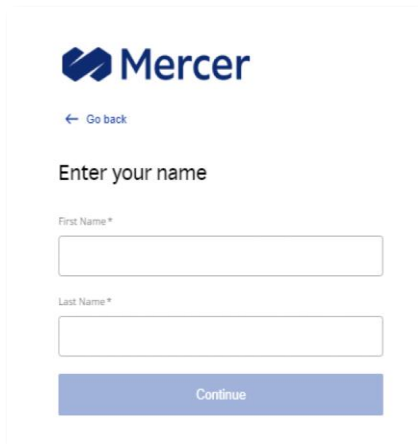
MercerVIP utilizes Mercer's standard login protocol. If you already have an account with another Mercer application, you may already be registered. If that is the case, you will be directed to login with your email and password instead of creating a new password. If you forgot your password, there is 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. Set up your password
3. You will receive a confirmation email to confirm your account
4. Check your email address and look for an email from MercerVIP to confirm your account



Mercer

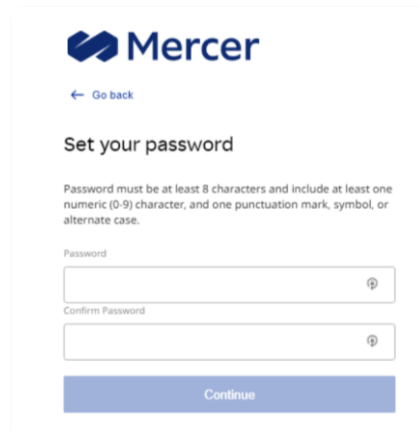
← Go back

Enter your name

First Name\*

Last Name\*

Continue



Mercer

← Go back

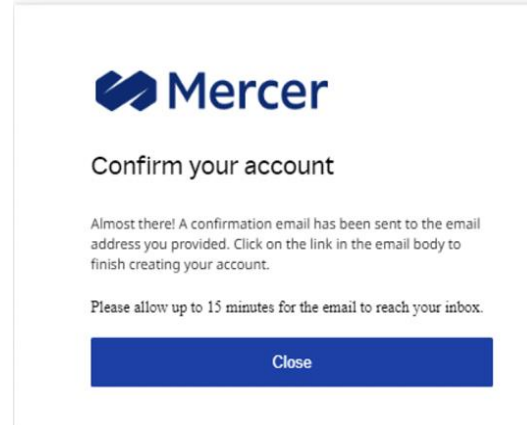
Set your password

Password must be at least 8 characters and include at least one numeric (0-9) character, and one punctuation mark, symbol, or alternate case.

Password

Confirm Password

Continue



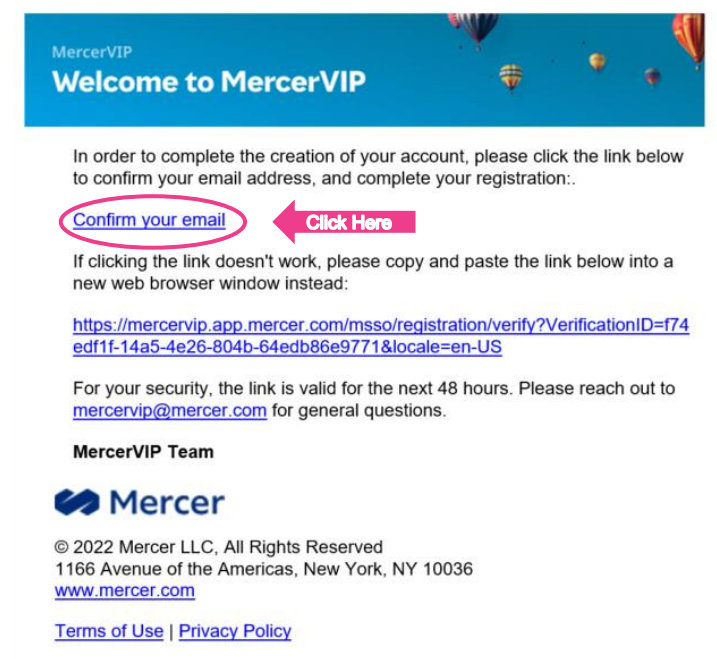
Mercer

Confirm your account

Almost there! A confirmation email has been sent to the email address you provided. Click on the link in the email body to finish creating your account.

Please allow up to 15 minutes for the email to reach your inbox.


Close



MercerVIP

### Welcome to MercerVIP

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](#) 

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

<https://mercervip.app.mercer.com/mssso/registration/verify?VerificationID=f74edf1f-14a5-4e26-804b-64edb86e9771&locale=en-US>

For your security, the link is valid for the next 48 hours. Please reach out to [mercervip@mercer.com](mailto:mercervip@mercer.com) for general questions.

MercerVIP Team

 Mercer

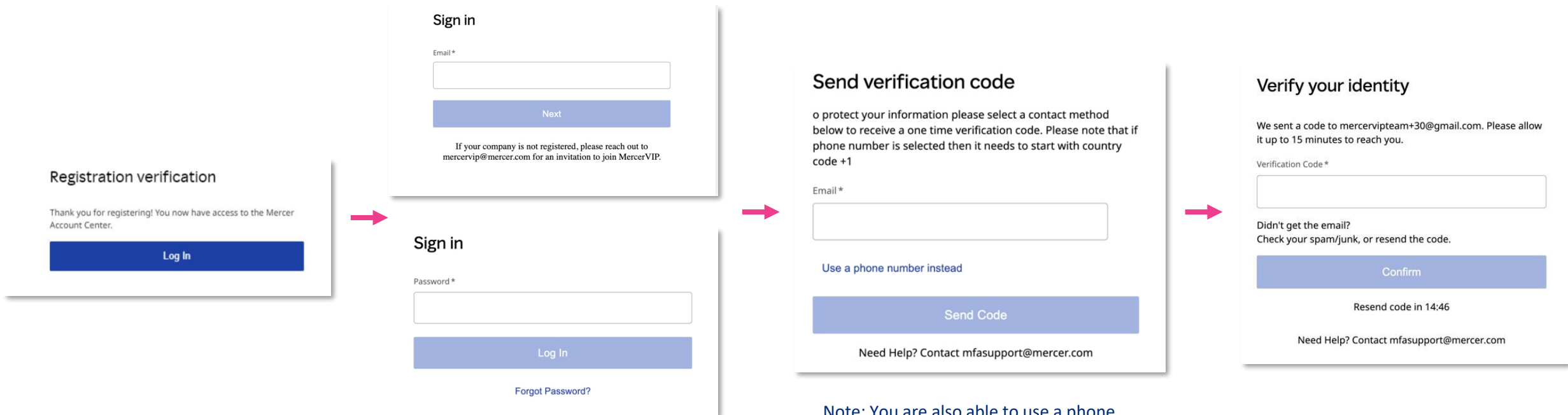
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[www.mercer.com](http://www.mercer.com)

[Terms of Use](#) | [Privacy Policy](#)

# MercerVIP

## Email Confirmation

After you confirm your email, you will be directed to log in with your credentials and password and complete a multi-factor authentication



Note: You are also able to use a phone number to receive the code. Click Use a phone number instead and input your number in the following format +1 333 333 3333

# 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

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

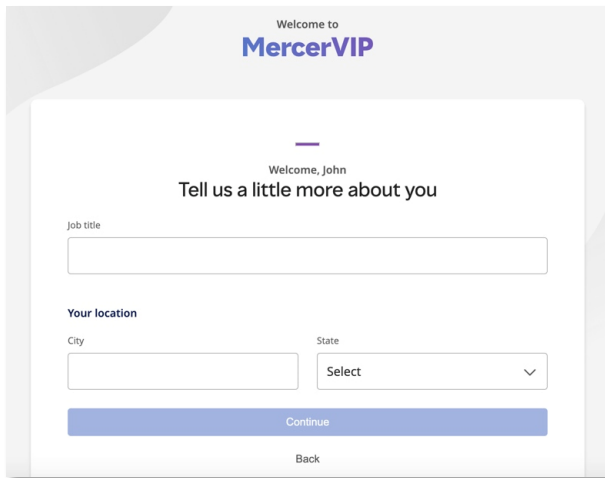
After you review the Terms of Service and Privacy Policy, click the check boxes to agree and click **Get started** to complete the sign up process.

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 then you will be able to access the MercerVIP platform.



Welcome to MercerVIP

Welcome, John

Tell us a little more about you

Job title

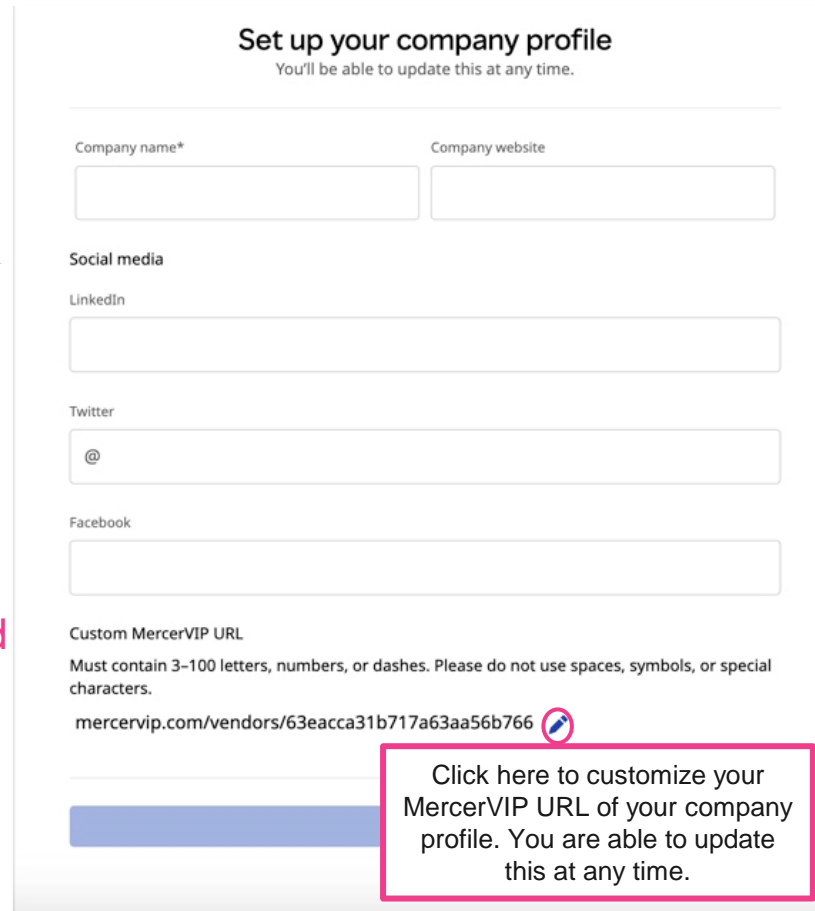
Your location

City

State

Continue

Back



Set up your company profile

You'll be able to update this at any time.

Company name\*

Company website

Social media


LinkedIn

Twitter

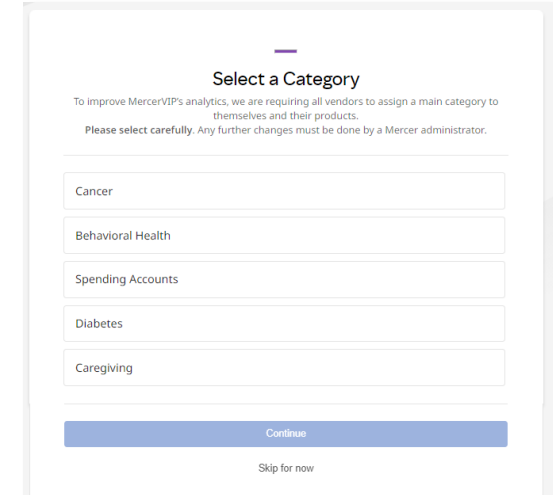
Facebook

Custom MercerVIP URL

Must contain 3-100 letters, numbers, or dashes. Please do not use spaces, symbols, or special characters.

mercervip.com/vendors/63eacca31b717a63aa56b766 

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



Select a Category

To improve MercerVIP's analytics, we are requiring all vendors to assign a main category to themselves and their products. Please select carefully. Any further changes must be done by a Mercer administrator.

Cancer

Behavioral Health

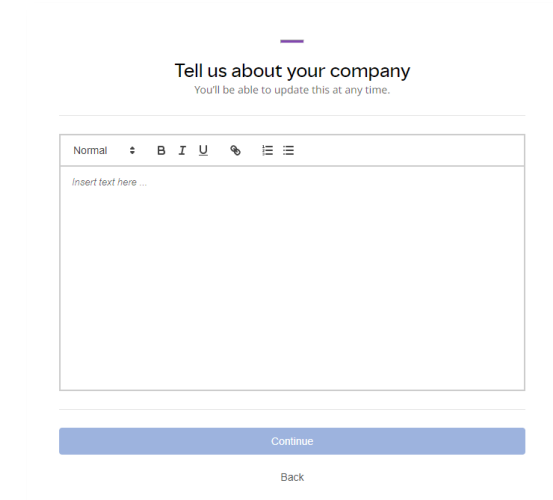
Spending Accounts

Diabetes

Caregiving

Continue

Skip for now



Tell us about your company

You'll be able to update this at any time.

Normal

Insert text here ...

Continue

Back

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



# 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

The screenshot shows the MercerVIP dashboard interface. On the left is a navigation panel with a list of menu items: Dashboard, RFP Tracker, Messages, Team, Company Profile, Overview, Products, Collateral, Events, Analytics, RFP Insights, Interaction Analysis, and Get Support. A red arrow points to the top of the navigation panel with a callout box that says "Click here to expand/collapse the names of each icon". The main content area is titled "MercerVIP" and includes a "Welcome, John" banner. Below the banner are two sections: "1 | Message Center" and "2 | Active RFPs".

**1 | Message Center** (Showing 1 of 1 | View all)

| Message   | Date ↑↓    |
|---|------------|
| Ethan Boyd <ethan.boyd@mercer.com><br>Hello, my client would like to schedule a demo to learn more about your product. Thanks | 12/08/2023 |

**2 | Active RFPs** (Showing 5 of 21 | View all)

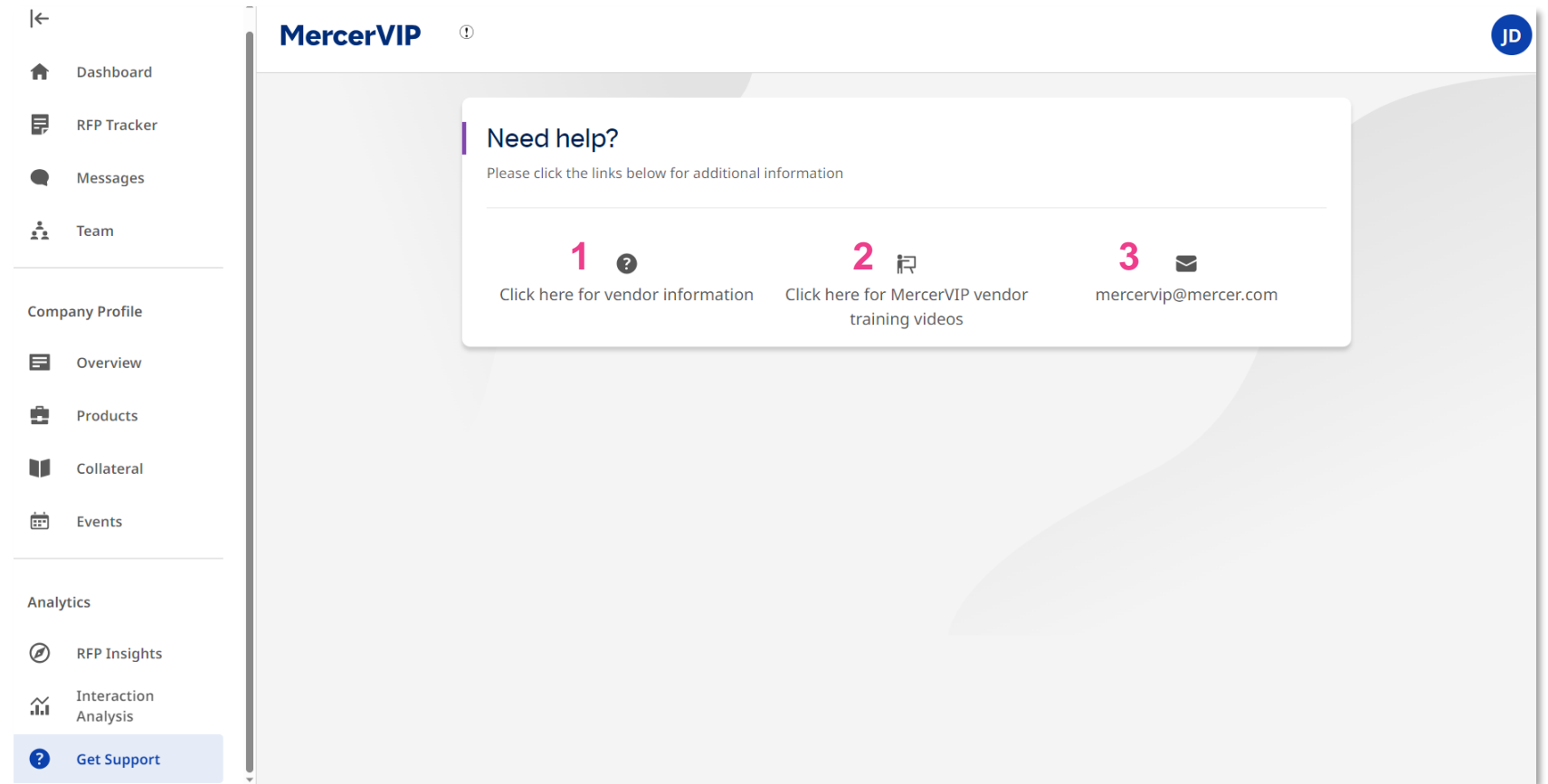
| Name ↑↓                                      | Client ↑↓ | Product                    | RFP Category ↑↓       | Status ↑↓ | Bid Date ↑↓ | Date Due ↑↓ |
|--|-----------|----------------------------|-----------------------|-----------|-------------|-------------|
| <a href="#">Lisa Test</a>                    | Tiger     | Lion Cancer Screening Test | Cancer                | Unread    | 09/29/2023  | 10/13/2023  |
| <a href="#">Mercer Learning Day Test RFP</a> | Tiger     | Lion Cancer Screening Test | Cardiovascular Health | Unread    | 08/24/2023  | 08/24/2023  |

# 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 the training videos
3. **[MercerVIP@mercer.com](mailto:mercervip@mercer.com)** – Takes you to your email where you can reach out to 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 ↕ |
|--|-------------------|--------------------|-----------------------|-----------|------------|------------|
| <a href="#">Ohana Cancer Screening RFP</a>   | Ohana Company LLC | Aloha Test Product | Cancer                | Answering | 02/03/2023 | 02/17/2023 |
| <a href="#">Ohana Cancer Screening RFP 2</a> | Acme              | Aloha Test Product | Cancer                | Posted    | 02/03/2023 | 02/10/2023 |
| <a href="#">Musubi Test Product</a>          | Acme              | Aloha Test Product | Cardiovascular Health | Accepted  | 02/03/2023 | 02/10/2023 |
| <a href="#">Pele's Test Product</a>          | Acme              | Aloha Test Product | Caregiving            | Answering | 02/03/2023 | 02/10/2023 |
| <a href="#">Cancer Screening Quote</a>       | 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. 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.

The screenshot displays the MercerVIP interface. On the left is a navigation sidebar with options: Dashboard, RFP Tracker, Messages (highlighted), Team, Company Profile, Overview, Products, Collateral, Events, Analytics, RFP Insights, Interaction Analysis, and Get Support. A pink arrow points to the 'Messages' option with the text 'Click to view message content'. The main area shows a 'Messaging' list on the left and a detailed view of a 'Demo Request' message on the right. The message list includes entries for 'Demo Request', 'Quick Demo', 'Product Message Test', 'Company Message Test', and 'Test'. The detailed view shows a message from John Smith (john.smith@mercer.com) dated Dec 08, 2023, at 10:17 AM. The message content is 'Hello, my client would like to schedule a demo to learn more about your product. Thanks'. Below the message is a reply field containing the text 'Great' and a 'Send' button. A pink arrow points to the reply field with the text 'Reply to messages here'.

# 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 • 9   Inactive • 7   Pending invites • 6

| Name ↕               | Email                      | Permissions ↕                      | RFP Emails ⓘ                                   |
|----------------------|----------------------------|------------------------------------|--|
| Mercervip, Mercervip | mercervip@mercer.com       | Admin                              | <input checked="" type="checkbox"/> Deactivate |
| Doe, John            | mercervipteam+32@gmail.com | ✓ Admin<br>✓ Editor<br>✓ Read-only | <input checked="" type="checkbox"/> Deactivate |

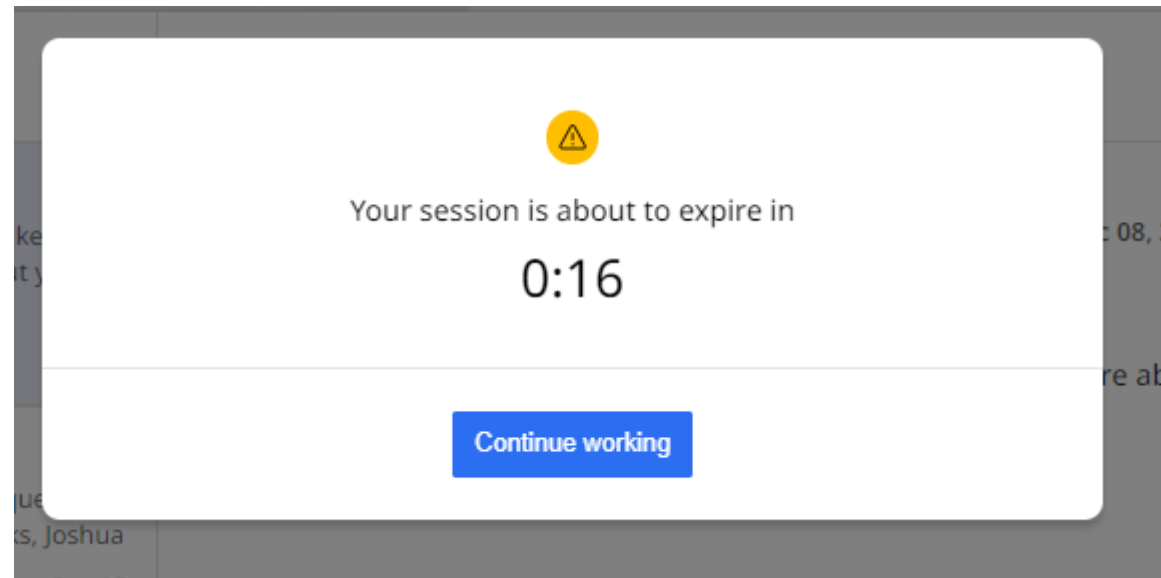
Input your colleague's email address to send them an invite to join

# Inactivity Time Out Feature

## System Notification

The MercerVIP application has a 10-minute time out feature to ensure system efficiency, resource management, and security. If no activity is detected after 8 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

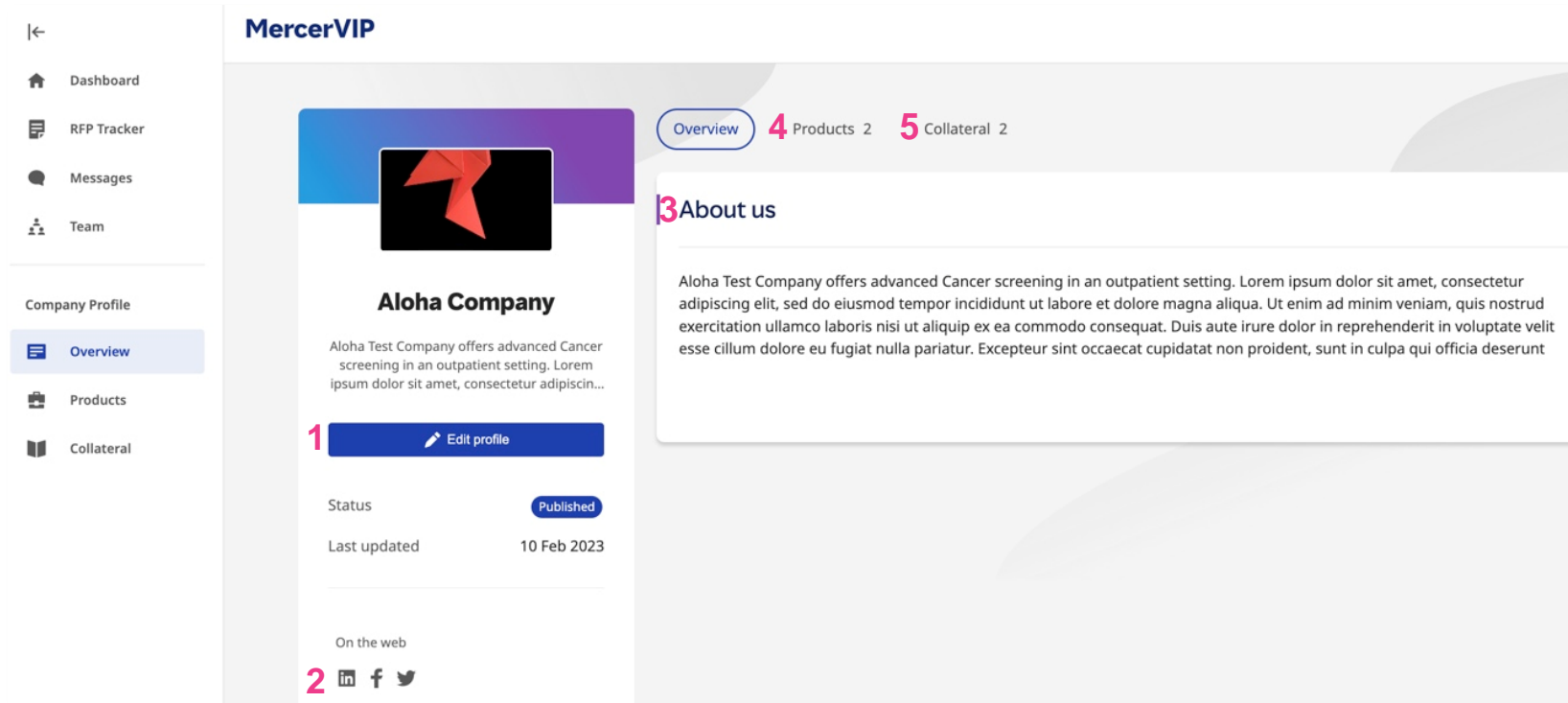


# MercerVIP

## 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](#)

**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](#).

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

**Contents**

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

[Save](#)

[Unpublish](#)

[Preview](#)

[Exit](#)

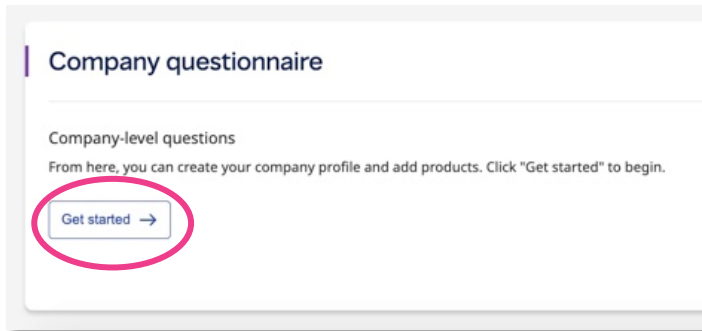
**Note: Main vendor category is required to publish your company. Once selected you will need to reach out to the MercerVIP team to make any changes**

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



A screenshot of the 'Mercer Demo - Company Questionnaire' page. The page has a blue header with 'Exit' on the left and '6 Save and Exit' on the right. Below the header is a yellow warning banner: 'You are editing a published questionnaire. Any saved changes will be immediately visible. All mandatory fields must be completed.' Below the banner is a section titled 'Let's get started' with the text: 'Please walk through the below question sets and answer each completely. In order to ensure profiles are current, the profile must be reviewed once per year. You must view all sections in order to publish your company profile.' Below this text is a progress indicator with four status options: 'Not started', 'In progress', 'Viewed, with required questions answered', and 'All questions answered'. Below the progress indicator is a list of question sets: 'Company key facts' and 'Company Funding Status'. A red arrow points from the 'Get started' button in the previous screenshot to the 'Company key facts' question set. A red bracket on the right side of the question set list is labeled 'See next page'.

- 1 Exit
- 2 Question Navigation
- 3 Legends for Question Set Status
- 4 Company Key facts Question Set
- 5 Company Funding Status Question Set
- 6 Save and Exit

**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

Exit Mercer Demo - Company Questionnaire Last saved Save and Exit

Company key facts Company key facts 1 of 2 ← →

Home / Company key facts

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

Company key facts 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**

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

The screenshot displays the MercerVIP interface. On the left is a navigation sidebar with options: Dashboard, RFP Tracker, Messages, Team, Company Profile (Overview, Products, Collateral), and Collateral. The main content area is titled 'MercerVIP' and shows the 'Aloha Company' profile. The profile includes a company logo, name, description, and an 'Edit profile' button (labeled '1'). Below the profile, the status is 'Published' and the last updated date is '10 Feb 2023'. At the bottom, there are social media icons for LinkedIn, Facebook, and Twitter. The right side of the page shows a list of products under the 'Products 2' tab. The first product is 'Aloha Product #2' (Cancer), which is 'Unpublished' (labeled '3'). It has an 'Edit' button (labeled '4') and a 'Delete' button (labeled '5'). The second product is 'Aloha Test Product' (Cancer), which is 'Published'. A '+ Add new product' button is visible in the top right corner.

# 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

The screenshot shows the 'Edit product' interface. At the top, there's a blue header with 'Edit product' and 'Last saved Oct 30, 2023 at 11:48am'. Below this is the 'Overview' section. It includes a 'Product Logo' upload area with a blue placeholder image and an 'Upload' button. The 'Product name' field contains 'Tiger Spending Account Test'. There are fields for 'Contact email' (test@test.com) and 'Website URL'. A 'Main product area' dropdown is set to 'None selected Assign', with a note: 'Once published, this will require a Mercer administrator to edit'. A pink arrow points to this dropdown with the text 'Select Primary Product Area'. Below this is a 'Product overview' text editor with a rich text toolbar and placeholder text. On the right side, there's a 'Content Status Tracker' sidebar with a pink border. It lists 'Overview' (with a blue checkmark), 'Category selection' (with a blue checkmark), and 'RFX questionnaire' (with a blue checkmark). Below the list are buttons for 'Save', 'Unpublish', and 'Delete'. At the bottom of the sidebar are '5 Q. Preview' and '6 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

# MercerVIP


## 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.

Product name \*

Contact email \*  Website URL

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

Normal

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

- 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

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](mailto:mercervip@mercer.com).

|   |  |
|---|--|
| <input checked="" type="checkbox"/> <b>ACA Compliance Services</b> <span>×</span><br>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. | <input type="checkbox"/> <b>Expert Medical Opinions</b> <span>+</span><br>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 |
| <input type="checkbox"/> <b>ACA Measuring &amp; Tracking</b><br>Solutions that assist with managing and tracking ACA metrics like full-time (30+ hour) tracking / eligibility determinations  | <input type="checkbox"/> <b>Financial Well-Being</b> <span>+</span><br>Services that support employees and members successfully manage financial expenses.   |
| <input type="checkbox"/> <b>ACA Reporting</b><br>Solutions that assist employers with ACA reporting   | <input type="checkbox"/> <b>Genetics</b> <span>+</span>  |

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  | <b>Company Overview</b>   |   |         |   |   |   |   |   |   |
| 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 | <b>Company key facts</b>  |   |         |   |   |   |   |   |   |
| 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:<br>· Private<br>· Private with outside investors<br>· Limited company<br>· Partnership<br>· Public company<br>· Mutual company<br>· 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:<br>· Seed/Pre-Seed<br>· Series A<br>· Series B<br>· Series C<br>· Series D   |         |   |   |   |   |   |   |

# 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 with an 'Exit' button (1), the title 'The Solution for Everything - RFX Questionnaire', and a 'Save and Exit' button (6). Below the header is a sidebar with a list of question sets: Clinical, Diversity & Inclusion, Solution Cost, Solutions Overview, Target Employer Business Details, User Experience, and Communications. A large bracket (3) groups the entire sidebar. The main content area is titled 'Let's get started' and includes a legend (2) for completion status: 'Not started', 'In progress', 'Viewed, with required questions answered', and 'All questions answered'. Below the legend, three question set cards are shown: 'Clinical', 'Diversity & Inclusion', and 'Solution Cost'. A bracket (4) groups the 'Clinical' and 'Diversity & Inclusion' cards, and another bracket (5) groups the 'Diversity & Inclusion' and 'Solution Cost' cards. Each card has a status icon and a right-pointing arrow.

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. The top navigation bar includes an 'Exit' button (1) on the left and 'Save and Exit' (9) on the right. The main content area is titled 'Discovery Questions' and includes a breadcrumb trail 'Home / Clinical / Discovery Questions'. A sidebar on the left contains a list of categories (2-5) with checkboxes: Clinical, Discovery Questions, RFX Questions, Diversity & Inclusion, Solution Cost, Solutions Overview, Target Employer Business Details, User Experience, Communications, and Compliance/Data Security. The main content area features a 'Mark all as N/A' button (5) and an 'Actions...' dropdown menu (3) with options for 'Copy from...' and 'Clear form' (4). A 'Copy from another product' dialog box is open, showing a 'Select product' dropdown and a 'Submit' button. The dialog box also includes a 'Note: This will overwrite any answers you may have provided for this section.' and a 'Cancel' button. The main content area also has a 'Save' button (6), a 'Save and Continue' button (7), and navigation arrows (8). The top right corner shows '1 of 21' and 'Section 1 of 21'.

**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.

Add Content

- Overview
- Category selection
- RFX questionnaire


Save

**Publish**

Delete

Preview

### Publish a product

 **"Aloha Test Product" will be published**  
Are you sure you want to continue with the request?

Cancel **Yes, continue**

# 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.

**Link Content** – Add new link to your collateral

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

Overview Collateral 2 Summary Documents 3

1 Link content 2 Upload a file

Documents 1 Media 1

All Other 1

| File name ↓                      | Description                       | Last updated ↓ |   |
|----------------------------------|-----------------------------------|----------------|---|
| <a href="#">Test Product Doc</a> | Brief description of the document | 01/30/2023     | ⋮ |
| Other                            |                                   |                |   |

3 Download

4 Edit

5 Delete

See next page

**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**

**Link to content**

Content URL\*  
Input URL to your content

Collateral type\*  
Select... Choose applicable content type

Content name\*  
Description

Cancel Submit

**Upload a file**

Drop your file here to upload...  
or  
Browse files

Maximum upload file size: 5 MB. Accepted file types

Collateral type\*  
Select... Choose applicable content type

Content name\*  
Description

Cancel Submit

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.

The screenshot shows a web interface with a navigation bar at the top containing 'Overview', 'Collateral 2', and 'Summary Documents 3'. Below the navigation bar, there are three document cards, each with a numbered list item on the left and a 'Download' button on the right. The first card is for the 'RFX Report', the second for the 'Survey Summary Report', and the third for the 'Short Summary'. Each card includes a brief description of the document's content.

- 1 | **RFX Report** [Download](#)  
RFX Report: Preview or download this report for a complete view of the vendor's answers to the RFP questions in MercerVIP.
- 2 | **Survey Summary Report** [Download](#)  
Survey Summary Report: Download this report to see a summary of the Vendor and Product details.
- 3 | **Short Summary** [Download](#)  
Product Short Summary: Download this report to see a high-level summary of the Product.

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

The screenshot shows an Excel spreadsheet with the following data:

|    | A  | B   | C  | D | E | F | G | H | I | J | K | L |
|----|--|---|--|---|---|---|---|---|---|---|---|---|
| 1  | <b>Company Overview</b>  |   |  |   |   |   |   |   |   |   |   |   |
| 2  |  |   |  |   |   |   |   |   |   |   |   |   |
| 3  | <b>Company name</b>  |   | Mercer Admin   |   |   |   |   |   |   |   |   |   |
| 4  |  |   |  |   |   |   |   |   |   |   |   |   |
| 5  | <b>'Contact us' email</b>  |   | mercervip@mercer.com   |   |   |   |   |   |   |   |   |   |
| 6  |  |   |  |   |   |   |   |   |   |   |   |   |
| 7  | <b>Website</b>   |   | https://testwebsite.com  |   |   |   |   |   |   |   |   |   |
| 8  |  |   |  |   |   |   |   |   |   |   |   |   |
| 9  | <b>Twitter™ name</b>   |   |  |   |   |   |   |   |   |   |   |   |
| 10 |  |   |  |   |   |   |   |   |   |   |   |   |
| 11 | <b>LinkedIn™ company page URL</b>  |   |  |   |   |   |   |   |   |   |   |   |
| 12 |  |   |  |   |   |   |   |   |   |   |   |   |
| 13 | <b>Overview</b>  |   | Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut |   |   |   |   |   |   |   |   |   |
| 14 |  |   |  |   |   |   |   |   |   |   |   |   |
| 15 | <b>Company key facts</b>   |   |  |   |   |   |   |   |   |   |   |   |
| 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 | <b>Year Founded</b>  |   | 2017   |   |   |   |   |   |   |   |   |   |
| 20 |  |   |  |   |   |   |   |   |   |   |   |   |
| 21 | <b>Company Financial Structure</b>   |   | Private  |   |   |   |   |   |   |   |   |   |
| 22 |  |   |  |   |   |   |   |   |   |   |   |   |
| 23 | <b>If publicly traded, identify exchange(s) and symbol(s)</b>  |   | N/A  |   |   |   |   |   |   |   |   |   |
| 24 |  |   |  |   |   |   |   |   |   |   |   |   |
| 25 | <b>If not publicly traded, indicate your financial stage and the capital invested in your organization or select private</b> |   |  |   |   |   |   |   |   |   |   |   |
| 26 |  |   |  |   |   |   |   |   |   |   |   |   |
| 27 | <b>If Other, please describe</b>   |   |  |   |   |   |   |   |   |   |   |   |
| 28 |  |   |  |   |   |   |   |   |   |   |   |   |
| 29 | <b>If you are able to disclose, please provide a list of your investors</b>  |   |  |   |   |   |   |   |   |   |   |   |
| 30 |  |   |  |   |   |   |   |   |   |   |   |   |
| 31 | <b>Merger &amp; acquisition activity</b>   |   | N/A  |   |   |   |   |   |   |   |   |   |
| 32 |  |   |  |   |   |   |   |   |   |   |   |   |
| 33 | <b>Annual corporate revenues (US\$, FYE 2016)</b>  |   | 1000000  |   |   |   |   |   |   |   |   |   |
| 34 |  |   |  |   |   |   |   |   |   |   |   |   |
| 35 | <b>Annual corporate revenues (US\$, FYE 2017)</b>  |   | 1000000  |   |   |   |   |   |   |   |   |   |

# MercerVIP

## Summary Documents

### Survey Summary Report

Survey Summary Report Mercer Admin | Tiger Spending Account Test



**Mercer Admin**  
2017

|   |                                   |                         |
|---|-----------------------------------|-------------------------|
|  | <b>'Contact us' email</b>         | mercervip@mercer.com    |
|  | <b>Website</b>                    | https://testwebsite.com |
|  | <b>Twitter™ name</b>              |                         |
|  | <b>LinkedIn™ company page URL</b> |                         |


#### 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



# 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

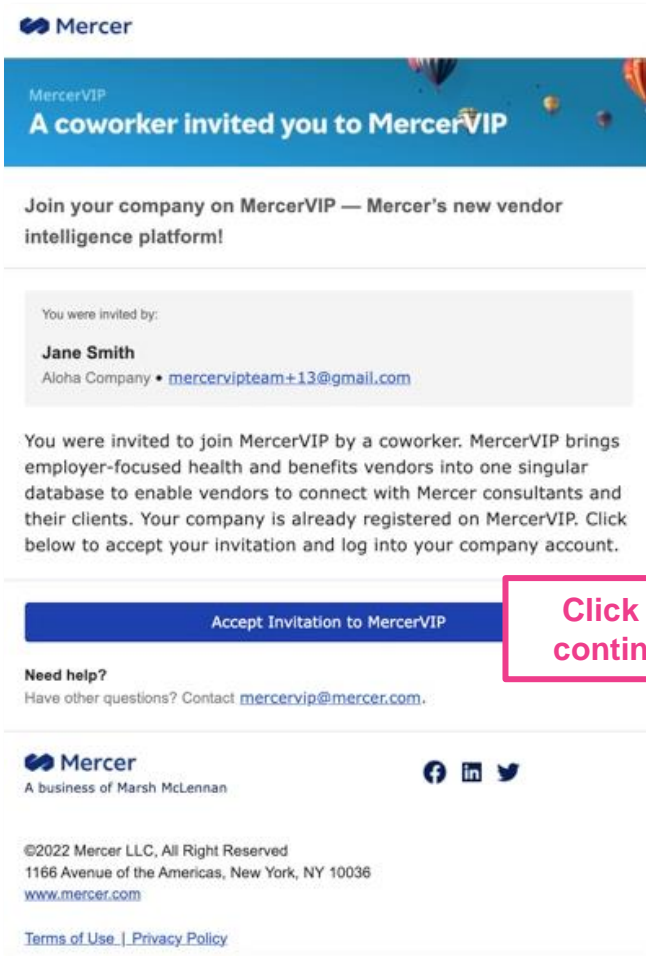
Add team member:

1 Active • 10    2 Inactive • 6    3 Pending invites • 7

| Name ↕               | Email                      | Permissions ↕ | Message Center ⓘ                    | RFP Emails ⓘ                        |            |
|----------------------|----------------------------|---------------|-------------------------------------|-------------------------------------|------------|
| Mercervip, Mercervip | mercervip@mercer.com       | Admin         | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Deactivate |
| Doe, John            | mercervipteam+32@gmail.com | Editor        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 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 ↑↓           |                     |
| samtkenedy@gmail.com               | Editor                   | Cancel              |
| samtkenedy+testvip30@gmail.com     | ✓ Admin<br>✓ Editor      | Cancel              |
| samtkenedy+testvipread33@gmail.com | ✓ Read-only<br>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.

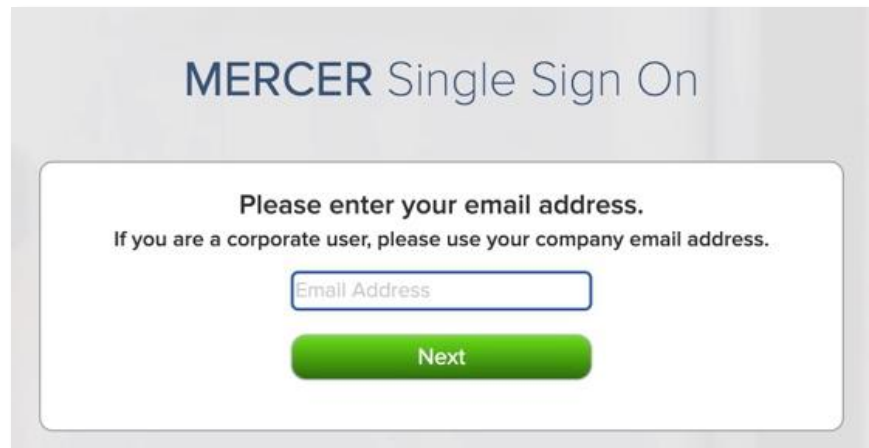
| Name ↑↓                                    | Client ↑↓         | Product            | RFP Category ↑↓                 | Status ↑↓ | Bid Date ↑↓ | Date Due ↑↓ |
|--|-------------------|--------------------|---------------------------------|-----------|-------------|-------------|
| <a href="#">Lilikoi Test Project</a>       | Acme              | Aloha Test Product | Employee Assistance Plans (EAP) | Unread    | 02/17/2023  | 02/24/2023  |
| <a href="#">Coffee Test RFP</a>            | Acme              | Aloha Test Product | Caregiving                      | Answering | 02/15/2023  | 02/24/2023  |
| <a href="#">Ohana Cancer Screening RFP</a> | Ohana Company LLC | Aloha Test Product | Cancer                          | Answering | 02/03/2023  | 02/17/2023  |
| <a href="#">Pizza Test RFP</a>             | 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.

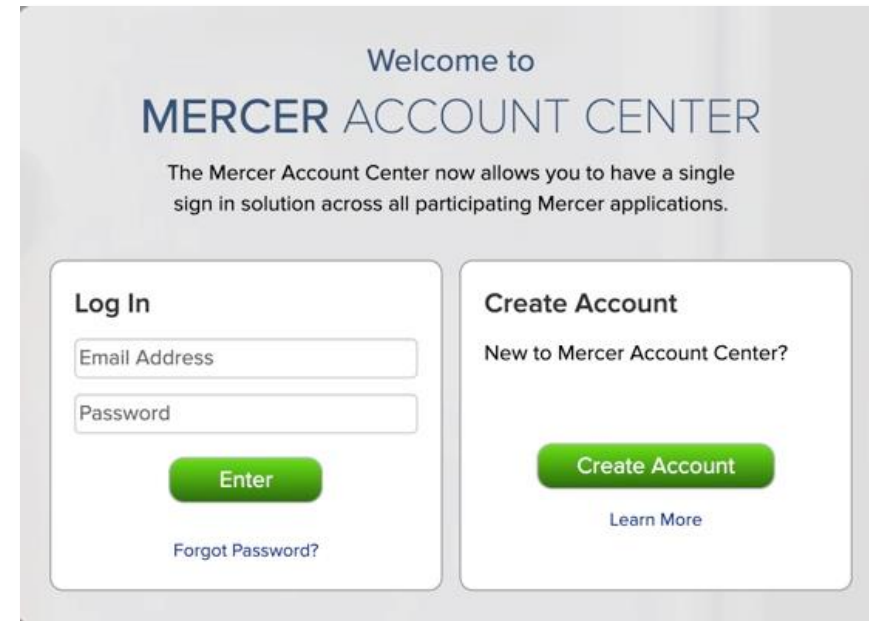


MERCER Single Sign On

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

**ALERT(S)** 

04:32:11pm First, accept or decline the invitation (or share the invitation with coworkers by using the Permissions link in the Actions menu).

**Permissions**

Please confirm or modify the primary contact listed below.

**Primary Contact**

**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](#)

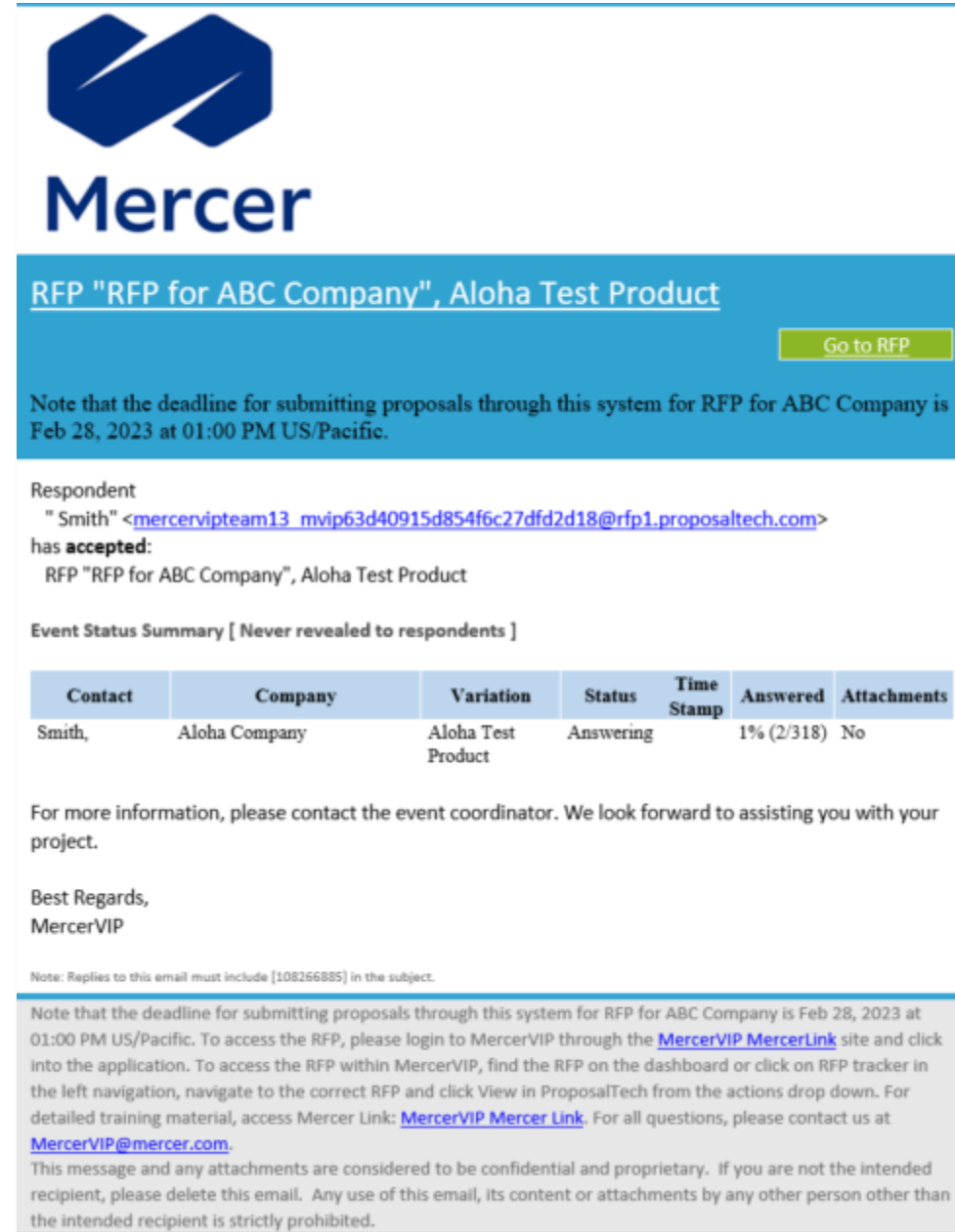
The screenshot shows a web application interface for an RFP. On the left is a dark sidebar with navigation options: Home, Invitation Manager, Intent to Participate (highlighted with a green checkmark), Help, Ask Question, and Tech Support. The main content area is titled 'RFP for ABC Company, Aloha Test 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' containing the text: 'You have been invited to participate in a RFP'. It lists '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 a 'Reply Message (Optional)'. Below the input field are four buttons: 'Accept', 'Decline', 'Assign to Coworker', and 'Cancel', which are highlighted with a green border. A note below the buttons says 'You may decline responding to the RFP after you have accepted it'. At the bottom, there is a section for 'Attachments from Mercer VIP:' with a table listing attachments.

| Name   | Date              | Size  |
|--|-------------------|-------|
| <a href="#">Download/Print Request</a>   |                   |       |
| <a href="#">All Attachments for Aloha Test Product</a> (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.



The screenshot shows an email notification from MercerVIP. At the top is the Mercer logo. Below it, the subject line reads "RFP 'RFP for ABC Company', Aloha Test Product". A green button labeled "Go to RFP" is positioned to the right. A blue banner contains a note about the submission deadline: "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 main body of the email states that a respondent, "Smith" (with a redacted email address), has accepted the RFP. Below this is an "Event Status Summary" table. The table has columns for Contact, Company, Variation, Status, Time Stamp, Answered, and Attachments. The data row shows "Smith" as the contact, "Aloha Company" as the company, "Aloha Test Product" as the variation, "Answering" as the status, and "1% (2/318)" as the answered count. The "Attachments" column shows "No". A paragraph of text follows, providing contact information for the event coordinator. The email concludes with "Best Regards, MercerVIP". A small note at the bottom states that replies must include a specific ID in the subject line. A final blue banner repeats the deadline information and provides instructions on how to access the RFP through the MercerVIP website, including a link to training materials and contact information. A disclaimer at the very bottom states that the message and attachments are confidential and proprietary.

**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](mailto: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](mailto: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 shows the Proposal Tech interface for an RFP titled "RFP for ABC Company, Aloha Test Product". The status is "Not Posted" and the due date is "02/28/23 01:00:00 PM PST". The "Invitation Manager" section shows "Questions: 318", "Answers: 2", and "0.6% answered".

The main content area lists several key details:

- 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](#)

Below these details are several action buttons:

- 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.)

The "Sender" information is displayed below:

|              |   |
|--------------|---|
| Name         | John Doe  |
| Company      | Mercer VIP  |
| Phone        |   |
| System Email | "John Doe" (johndoe_mercervip@rfp1.proposaltech.com><br>(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 navigation options: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, Edit Response (highlighted with a red circle), Messaging/History, Reports / Print, Standard, Tabular, Actions, Post Answers, Change Permissions, Help, and Tech Support. 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, it indicates "Questions: 387", "Answers: 177", and "45.7% answered". A "Due Dates" section shows "Dec 15, 2023 at 01:00 PM US/Pacific". The main content is a table of contents with the following structure:

- 1 Introduction
- 2 From Mercer VIP
  - 2.1 Company Level Questions
    - 2.1.1 Company key facts (8 Answers / 16 Questions)
    - 2.1.2 Company Funding Status (3 Answers / 4 Questions)
  - 2.2 Product Specific Questions (88 Answers / 289 Questions)
    - 2.2.1 Clinical (6 Answers / 32 Questions)
      - 2.2.1.1 Discovery Questions (1 Answer / 6 Questions)
      - 2.2.1.2 RFX Questions (5 Answers / 26 Questions)
        - 2.2.1.2.1 Clinical Structure (2 Answers / 6 Questions)
        - 2.2.1.2.2 Clinical Process (3 Answers / 20 Questions)
      - 2.2.2 Diversity & Inclusion (5 Answers / 27 Questions)
        - 2.2.2.1 Discovery Questions (2 Answers / 8 Questions)
        - 2.2.2.2 RFX Questions (3 Answers / 19 Questions)
      - 2.2.3 Solution Cost (3 Answers / 12 Questions)
        - 2.2.3.1 Discovery Questions (3 Answers / 12 Questions)
      - 2.2.4 Solutions Overview (17 Answers / 50 Questions)
        - 2.2.4.1 Discovery Questions (10 Answers / 30 Questions)
        - 2.2.4.2 RFX Questions (7 Answers / 20 Questions)
      - 2.2.5 Target Employer Business Details (2 Answers / 8 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 shows the MercerVIP interface. On the left is a dark sidebar menu with the following items: 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 this, there is a section for 'Add New Attachments' with an 'Upload Attachments' button. A message states: 'Your attachments as part of this response: No documents are attached as part of this response.' Below that is a section for 'Attachments from Mercer VIP' with a table:

| Name   | Date              | Size  |
|--|-------------------|-------|
| <a href="#">All Attachments for Aloha Test Product (includes all of the following)</a> | 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 shows a 'Filter' dropdown and 'Data Sources' dropdown. Below this, it indicates 'Questions: 387', 'Answers: 177', and '45.7% answered'. On the right, it shows 'Unanswered Questions: 6' and '7'. The question list includes sections: '+ 1 Introduction', '+ 2 From Mercer VIP' (with '177 Answers / 387 Questions'), '+ 2.1 Company Level Questions' (with '11 Answers / 20 Questions'), and '- 2.1.1 Company key facts' (with '8 Answers / 16 Questions'). A specific question '2.1.1.1 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' is visible. Below the question is a text input field. At the bottom, there are four tabs: 'ATTACHMENTS', 'PAST ANSWERS', 'FLAGS & COMMENTS', and 'Q&AS/NOTICES'. A 'Save All' button is located at the bottom right. The numbers 1 through 5 are placed below the tabs and the 'Save All' button respectively.

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 displays the MercerVIP interface for an RFP titled "RFP for ABC Company, Aloha Test Product". The status is "Not Posted" with a due date of "02/28/23 01:00:00 PM PST". The user is identified as "Smith".

The main content area is titled "Post RFP for ABC Company" and contains the following text:

Posting the entire response makes these answers visible to the solicitor and prevents further modifications without unposting. The solicitor may prevent unposting at any time. All documents currently attached to the response would become visible to the solicitor.

**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 text is a text input field and two buttons: "Post Response" (highlighted with a red box) and "Cancel". A green arrow points from the "Post Response" button to an "ALERT(S)" notification box.

The "ALERT(S)" box displays the following message:

11:59:59am Posted. (System time: 11:59:59 Feb 16, 2023 US/Pacific)


The left sidebar menu includes the following items:

- 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 red)
- Change Permissions
- Help
- Ask Question
- Tech Support

# MercerVIP

## Proposal Tech – Post Answers

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



The screenshot shows an email from MercerVIP. At the top is the Mercer logo. Below it, the subject line is "RFP 'RFP for ABC Company'" with a "Go to RFP" button. A note states the deadline for submitting proposals is Feb 28, 2023 at 01:00 PM US/Pacific. The main body of the email says "The Consultant for RFP 'RFP for ABC Company' has **POSTED** the RFP." Below this is an "Event Status Summary [ Never revealed to respondents ]" table. The table has columns for Contact, Company, Variation, Status, Time Stamp, Answered, and Attachments. The only entry is for Smith, Aloha Company, Aloha Test Product, Unread, N/A, and No. Below the table, it says "For more information, please contact the event coordinator. We look forward to assisting you with your project." The email ends with "Best Regards, MercerVIP" and a note that replies must include [108266885] in the subject. A final note repeats the deadline and provides instructions on how to access the RFP through the MercerVIP MercerLink site, along with contact information for MercerVIP@mercervip.com.

**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@mercervip.com](mailto:MercerVIP@mercervip.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 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, 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 shows message history:

| 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... |       |

The detailed view of the selected message shows it was sent on "02-15 17:20:07" from "[108266885] Smith of Aloha Company" with the subject "Smith of Aloha Company accepted RFP 'RFP for ABC Company', Aloha Test Product 2023-". The message content includes the Mercer logo, the text "RFP 'RFP for ABC Company', Aloha Test Product", a "Go to RFP" button, and a note: "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.

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

### 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 Marked            | Exclude Marked           | Flag Name    |
|--------------------------|--------------------------|--------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Needs Review |

- Only questions with answers updated since

**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 MercerVIP interface for an RFP titled "RFP for ABC Company, Aloha Test Product". The status is "Not Posted" and the due date is "02/28/23 01:00:00 PM PST". The "Permissions" section is active, showing a dropdown for the "Primary Contact" set to "Smith, <mercervipteam+13@gmail.com>". Below this, a table lists "Existing Users" with their email addresses and checkboxes for "Edit", "Post", "Admin", and "Email" permissions. A "Submit" button is located at the bottom left of the permissions section. A red notification banner in the top right corner reads "Updated Test PI".

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

**Permissions** Updated Test PI

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

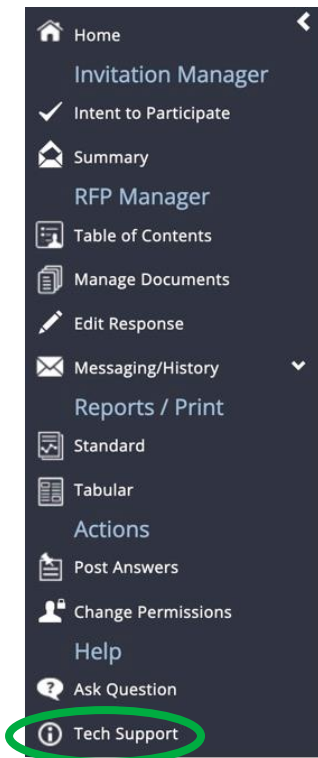
Submit

**\*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.

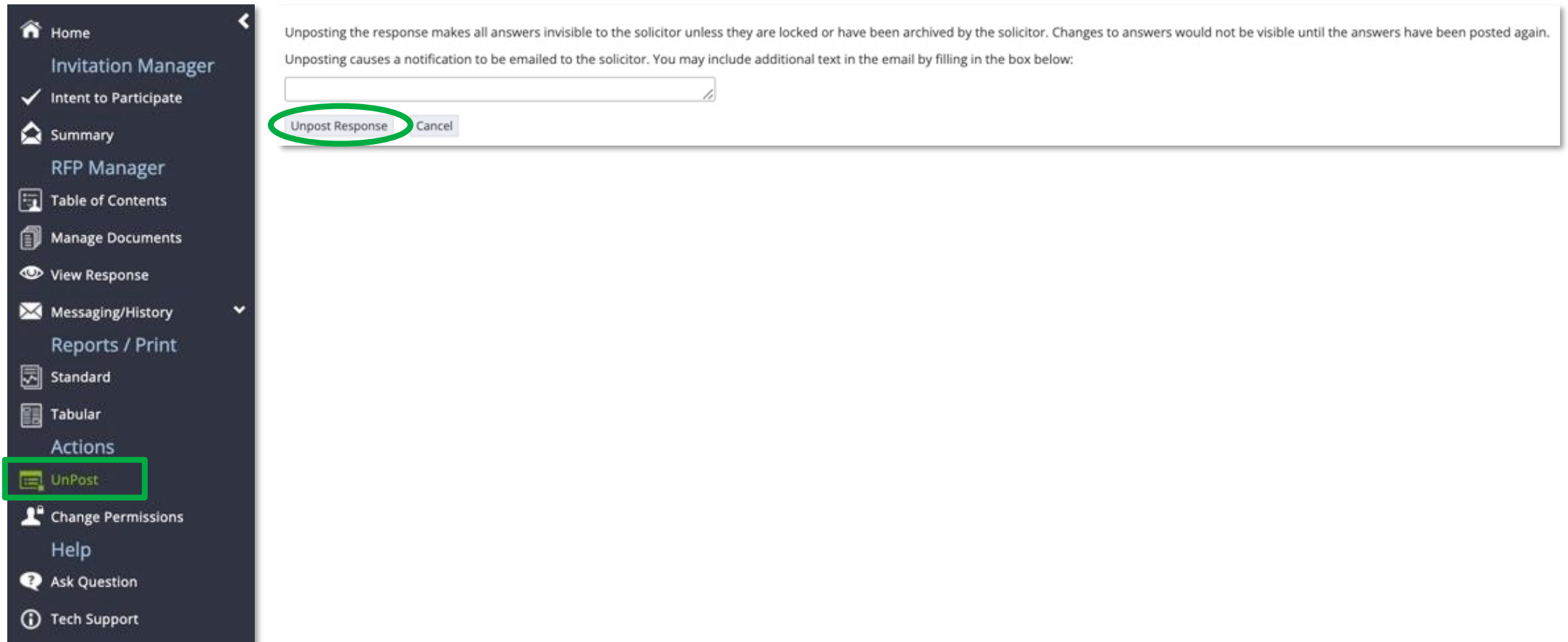
A white form titled 'REPORT A PROBLEM' with a close button in the top right. The form contains the following text and fields: 'To ensure that we can address any problems that you discover quickly and efficiently, please describe the problem in detail, including what you were doing just before the problem occurred and any error messages the system displayed.'; 'Support staff are also available to assist you by email at [support@proposaltech.com](mailto:support@proposaltech.com) and by phone at (877)211-8316, option 4.'; 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](mailto: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.



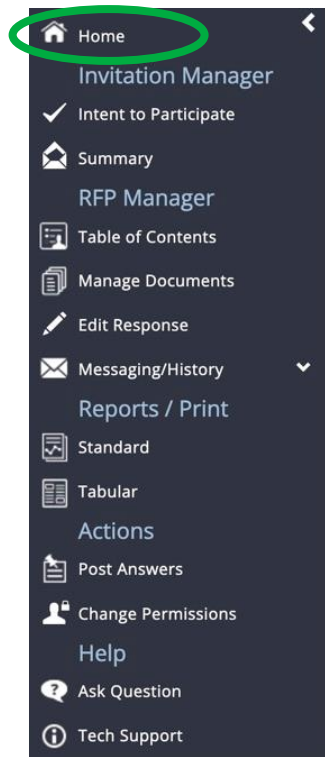
The screenshot displays the MercerVIP user interface. On the left is a dark sidebar with a list of navigation items: Home, Invitation Manager, Intent to Participate, Summary, RFP Manager, Table of Contents, Manage Documents, View Response, Messaging/History, Reports / Print, Standard, Tabular, Actions, UnPost, Change Permissions, Help, Ask Question, and Tech Support. The 'UnPost' item is highlighted with a green rectangular box. To the right of the sidebar is a light-colored dialog box. The dialog 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 a text input field. At the bottom of the dialog are two buttons: 'Unpost Response' and 'Cancel'. The 'Unpost Response' button is circled in green.



# 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 )

# Questions?

Please reach out to [mercervip@mercer.com](mailto:mercervip@mercer.com)

welcome to  
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