



RFP #922577 Q&A

- 1. Question: In lieu of a HECVAT, will MSU accept alternatives such as a SOC 2 report, ISO 27001, or other detailed Security Statement for the technical evaluation?**

Answer: HECVATs are preferred. Please provide your SOC2, ISO 27001, and other security documentation in your proposal submission for review during the evaluation process.

- 2. Question: Our company has experience working with Higher Education Institutions similar in size and scope of MSU as well as complies with all relevant accessibility laws and applicable best practices in our web-based platform design. Our development process is informed by the principles of WCAG 2.1 and aims to ensure inclusive experiences for all users, while also meeting the highest standards of data privacy, security, and financial compliance.**

As a global provider of secure financial disbursement solutions, we must carefully balance accessibility requirements with regulatory obligations, including those related to information security and data protection. In some cases, specific accessibility techniques may pose conflicts with these obligations. In those instances, we prioritize compliance with legal and security mandates while continuing to support accessibility in all other areas.

While we do not currently maintain a formal Voluntary Product Accessibility Template (VPAT) or Accessibility Conformance Report, our team is actively working toward engaging a third-party accessibility partner to help evaluate and enhance our platform using assistive technologies and real user testing across a range of disabilities.

We have supported clients in federal, state, higher education, and non-profit sectors who require accessibility assurance. In those partnerships, we collaborate directly with clients to ensure that the user experience meets their accessibility goals, and we are committed to remediating any identified issues where feasible. If Michigan State University or any user identifies areas that may fall short of accessibility best practices—and those areas do not present conflicts with data security or regulatory requirements—we will work in good faith to remediate those issues or provide a customized delivery experience to meet MSU's specific needs.

We remain committed to evolving our accessibility posture and aligning with current and emerging standards, including WCAG 2.2, in a secure and responsible manner.

In lieu of a VPAT, would this commitment suffice?

Answer: VPATs are preferred. Please provide this information in a formal document, along with an accessibility roadmap and submit with your proposal. Your solution's accessibility will be reviewed during the evaluation process.

- 3. Question: Minimum Requirements Documents #9:
Solution Must provide simple and expedited process for MSU to cancel and receive refunds that are issued to participants but not redeemed within a specified period.**

What is the expected timing for requirement #9?

Answer: 2-4 weeks or less.



4. Question: Minimum Requirements Documents #19 & #20:

#19: Solution Reports Must include information that identifies payments to non-US citizens; #20: Solution Reports Must include automated W-8BEN request for participants who are non-US citizens.

For requirements 19 & 20, would you be able to provide us the details on recipient non-citizen status or are you expecting us to know this detail?

Answer: This is a project-specific requirement, and individual project coordinators would provide this information.

5. Question: Regarding Section 7 of Preferred Requirements:

Is your Spartan Marketplace compatible with API?

Answer: Spartan Marketplace uses the ESM platform. ESM supports a range of APIs, but we don't currently have visibility into whether a specific integration is in place with your organization. Depending on the situation, we may be able to use an existing API or may need to develop a new integration. As part of your RFP response, please include information about your API capabilities.

6. Question: What data types will MSU transmit to [supplier solutions]? (PII, PHI, student records, employee data)?

Answer: We aren't sure that we'd have a need for student records and/or employee data to be transmitted. If PII or PHI is transmitted, individual project coordinators would provide it. We are not aware of the need to transmit such data between platforms.

7. Question: What constitutes a "Deliverable"—does MSU expect IP ownership of platform configuration or only bespoke work product

Answer: The deliverable is the compensation received by the participant. No IP ownership or bespoke work product is needed.

8. Question: Does the subcontractor approval requirement apply to [supplier's] infrastructure providers (AWS, payment processors) Or only to human subcontractors performing services on-site?

Answer: Yes. If the respondent's proposal specifically names its chosen infrastructure/payment providers, MSU can vet those during the proposal phase and can include them in any awarded contract, which would qualify as MSU's approval for such sub.

9. Question: Is FERPA data in scope? Are any student records involved?

Answer: FERPA data does not appear to be in scope for this RFP.

10. Question: Page Number: 8–9 (Scope of Work / Current Environment)

How many colleges, departments, or research units does MSU anticipate will actively issue participant payments using the selected solution(s) within the first year following contract award?

Answer: The awarded platform(s) will be available to all MSU departments for use as necessary. There is not an estimated number of colleges, departments, or research units.

11. Question: Page Number: 9 (Current Environment / Volume Information)

Can MSU provide an estimated number of internal users (e.g., researchers, coordinators, finance staff, administrators) who will require access to the platform across all departments?

Answer: MSU will be unable to estimate the number internal users, as that will vary based on participation by colleges, departments, or research units.



12. Question: Page Number: 9–10 (Mandatory Minimum Requirements – Dashboard & Access Controls)

On average, how many users per department does MSU expect will access the platform (e.g., one or two administrators versus larger research teams)?

Answer: MSU will be unable to estimate the number of users who will have access as the number of coordinators and staff will vary by participating colleges, departments, or research units.

13. Question: Page Number: 9–10 (Mandatory Minimum Requirements – Dashboard & Permissions)

Will MSU designate a central administrative team with oversight across all departments, or will each department independently manage its own users and access permissions?

Answer: Each department will independently manage its own users and access permissions.

14. Question: Page Number: 10 (Mandatory Minimum Requirements – Role-Based Access)

Does MSU intend to define standardized user roles (e.g., issuer, approver, viewer, finance-only), or should respondents assume departments may configure roles independently?

Answer: MSU would prefer independent configuration by department but would accept standardized roles across MSU.

15. Question: Page Number: 10 (Mandatory Minimum Requirements – Access Permissions)

Are approval workflows for issuing participant payments expected (e.g., segregation between issuer and approver), and if so, should these workflows be consistent across the University or configurable by department?

Answer: Approval workflows are not expected but may vary by participating colleges, departments, or research units..

16. Question: Page Number: 10 (Mandatory Minimum Requirements – Role Restrictions & PII)

Will MSU require users with finance, reconciliation, audit, or tax responsibilities to have read-only or restricted access that excludes visibility into identifiable participant information?

Answer: A need for this type of access is not expected.

17. Question: Page Number: 9–10 (Mandatory Minimum Requirements – User Access & Security)

Should respondents anticipate frequent user changes (e.g., graduate students, research assistants, temporary staff), and does MSU require support for time-bound or expiring user access?

Answer: Yes, frequent user changes are expected. Unsure of what support for time-bound or expiring user access means. Please define/explain in your proposal.

18. Question: Page Number: 8 (Scope of Work – Multiple Awards)

Question: If multiple suppliers are awarded, will departments or individual users be permitted to access more than one supplier platform, or will each department be assigned to a single supplier?

Answer: Departments and individual users will be permitted to access more than one supplier platform if multiple suppliers are awarded.



19. Question: Please provide the current average monthly volumes of ACH and Check payments that MSU issues for all transactions in scope within the RFP. Also, can you clarify the individual volumes or percentages that pertain to Consumer payments or Vendor payment activities?

Answer: The Accounting Office issues about 300 checks for research participation monthly (consumer). Additionally, about 1 vendor payment monthly. No ACH.

20. Question: Please clarify the RFP section around HIPAA compliance. Is there an expectation that MSU will issue some payments with PHI data included? If so, what is the monthly volume of those items? Can those payments be split out and supported through a separate program from the rest?

Answer: There may be a possible need for payments with PHI data included. Unsure of monthly volume or need for split.

21. Question: Describe your current payables process frequency – daily, weekly, monthly? Please include which payments follow each schedule.

Answer: Payments are most likely to be made on demand for research purposes, but if a schedule is followed, it could vary depending on individual study needs.

22. Question: Describe MSU's current reconciliation process for all payments in scope. Is this performed using the bank's electronic data files? If so, in what frequency and in what electronic file formats are needed?

Answer: The process would be performed using the vendor's electronic data files (i.e., MS Excel, csv, and pdf options needed). The frequency would be on demand.

23. Question: For both Consumer or Vendor payments, does MSU currently enroll and store ACH bank account information internally with controlled security access? If so, describe your payee bank account validation procedures. Would your team be interested in an Account Validation Service to confirm both the existence and ownership[of collected bank account data?

Answer: MSU does not currently enroll vendors in ACH. Suppliers interested in receiving payments electronically can enroll in [Paymode-X](#).

24. Provide any other unique requirements that are involved in the current payments process in scope. Are PDF attachments a requirement for some portion of your current payables process that could be emailed or inserted? If yes, please expand on those use cases or provide examples. Are some of these one-time payouts or mostly repetitive in nature? Specify which ones are one-time only.

Answer: We don't currently provide such attachments.

25. Question: Mandatory Minimum Requirements, pg. 2

Do you currently make digital payments internationally or to any non-us citizens? Are they paid out in USD? Does MSU make payments to non-banked individuals? If yes, how are these situations handled today and what are the monthly volumes?

Answer: We do not currently make international or non-US citizen payments. We do not require that recipients provide banking information.



26. Question: Do you currently print all check payments in-house or use a 3rd party? If in-house, how often do you need to include any special enclosures or inserts within those payments? How are emergency checks handled?

Answer: For the few projects that still issue paper checks, they are printed in-house. There is not a need for special enclosures or inserts. Emergency checks are processed twice a week.

27. Question: Mandatory Minimum Requirements, pg. 2

Do you currently maintain either an email address or mobile phone number on all your Consumer based payments? Is the email address issued by MSU or does each individual use their personal one?

Answer: No. Participant information and payment logs are kept according to individual project requirements.

28. Question: Please describe any current IT or ERP initiatives or payables automation goals that a new potential banking partner should be aware of to assist in the success of this effort.

Answer: None known.

29. Question: The MSA references an attached "Schedule A – Statement of Work," but we did not receive it with the RFP attachments. Can you please provide Schedule A ?

Answer: The MSA is located on our [Bid Opportunities webpage \(https://procurement.msu.edu/for-suppliers/bid-opportunities\)](https://procurement.msu.edu/for-suppliers/bid-opportunities) along with the RFP document and Mandatory Minimum Requirements document.

30. Question: How many users will the University need in the first 12 months? A user is an MSU employee with access to the patient payment platform. This should include University admis at least 2 plus patient facing study coordinators who will be requesting payment via the platform.

Answer: Please see answers to questions 10, 11, and 12.

31. Question: How many participants will be entered into the platform in the first 12 months? A participant is someone getting payment from the platform.

Answer: MSU will be unable to estimate the number of participants, as that will vary based on participation.

32. Question: How many payments will be made by the platform in the first 12 months?

Answer: MSU will be unable to estimate the number of payments, as that will vary based on participation.