
ADDENDUM NUMBER 01

For

Human Resources Management/Payroll System & Services

Addendum Issue Date: March 26, 2019

Purpose: The purpose of this Addendum is to change the bid **Opening Date**. Bidders shall review the Addendum work and requirements in detail and incorporate any effects the Addendum may have in their bid.

Acknowledgement: Bidders should acknowledge receipt of any and all Addenda on the Proposal Form. Failure to do so may result in rejection of the Proposal. All requirements of the proposal documents remain unchanged except as cited herein.

Project Changes:	Description
Bid Opening Date	**CHANGED to Friday April 19, 2019 at 2:00 p.m.**

END OF ADDENDUM NO. 01

BENTON COUNTY HUMAN RESOURCES MANAGEMENT/PAYROLL SYSTEM & SERVICES
KEY INFORMATION SUMMARY SHEET

RFB Issue/Ad Date(s):	March 22, 2019
RFB Issuing Office:	Benton County Government
Properties Representative:	Terry Lewis Office Phone: 479-464-6168 Fax: 479-271-1748 E-mail: terry.lewis@bentoncountyar.gov
USPS Mail Address: **(or hand-deliver)**	Benton County Administration Building Properties Office 215 E. Central Ave., Ste. 309 Bentonville, AR 72712 Attention: Terry Lewis
Bids Due / Deadline:	April 5, 2019 @ 2:00 p.m. local time

Pursuant to Arkansas Code Annotated §22-9-203 Benton County encourages all qualified small, minority and women business enterprises to bid on and receive contracts for goods, services, and construction. Also, Benton County encourages all general contractors to subcontract portions of their contract to qualified small, minority and women business enterprises.

RFB's shall be submitted in sealed envelopes labeled: **Human Resources Management/Payroll System & Services Bid** with the name and address of the Bidder.

RFB's shall be submitted in accordance with the attached Benton County specifications and RFB documents attached hereto. Each Bidder is required to fill in every blank and shall supply all information requested; failure to do so may be used as basis of rejection

Advertisement

Benton County, Arkansas is requesting bids for Human Resources Management/Payroll System and Services. To be considered, bids must be received at the Benton County Administration Building, 215 East Central, Room 309, Bentonville, Arkansas before April ~~2~~ 5, 2019 @ 2:00pm (Local time).

Forms and addendums can be downloaded from the County's web site at https://bentoncountyar.gov/accounting/open-bids/. All questions regarding the qualification process should be directed to Terry Lewis at terry.lewis@bentoncountyar.gov or by telephone at 479-464-6168. All questions regarding specifications should be directed to Amy Ochoa, Director of Human Resources @ 479-271-1091 or via email at amy.ochoa@bentoncountyar.gov or Brenda Guenther, Comptroller @ 479-271-5767 or via email at brenda.guenther@bentoncountyar.gov.

Bids submitted shall be qualified to do business and licensed in accordance with all applicable laws of the state and local governments where the project is located.

Pursuant to Arkansas Code Annotated §22-9-203 Benton County encourages all qualified small, minority and women business enterprises to bid on and receive contracts for goods, services, and construction. Also, Benton County encourages all general contractors to subcontract portions of their contract to qualified small, minority and women business enterprises.

Benton County reserves the right to reject any and all bids and to waive irregularities therein, and all Bidders shall agree that such rejection shall be without liability on the part of Benton County for any damage or claim brought by any Bidder because of such rejections, nor shall the Bidder seek any recourse of any kind against Benton County because of such rejections. The filing of any bid in response to this invitation shall constitute an agreement of the Bidder to these conditions.

Ad date: March 22, 2019

1. SUBMISSION OF A BID:

A. Bids may be submitted electronically (CD or USB flash drive) in addition to one (1) hard copy. Please submit your documents on a properly labeled CD or USB flash drive. The use of Adobe PDF documents is strongly recommended. Files contained on the CD or electronic media shall not be restricted against saving or printing. The electronic copy shall be identical to the original papers submitted. Electronic copies shall not be submitted via e-mail to County employees.

B. Bids will be reviewed following the stated deadline, as shown on the cover sheet of this document. The names of respondents only will be available after the deadline until a contract has been awarded by the Benton County. All interested parties understand proposal documents will not be available until after a valid contract has been executed.

C. Bidders shall submit a bid based on documentation published by Benton County.

D. Bids shall be enclosed in sealed envelopes or packages addressed to Benton County, 215 East Central, Room 302, Bentonville, Arkansas 72712. The name, address of the firm and RFB name shall be on the outside of the packaging as well as on any packages enclosed in shipping containers or boxes.

E. Bids must follow the format of the RFB. Bidders should structure their responses to follow the sequence of the RFB.

F. Bidders shall have experience in work of the same or similar nature, and must provide references that will satisfy Benton County. Bidder may furnish a reference list, of clients for whom they have performed similar services and must provide information as requested in this document.

G. Bidder is advised that exceptions to any of the terms contained in this RFB or the attached service agreement must be identified in its response to the RFB. Failure to do so may lead the County to declare any such term non-negotiable. Bidder’s desire to take exception to a non-negotiable term will not disqualify it from consideration for award.

H. Bids will need to be received by April 5, 2019 @ 2:00 pm (local time).

2. WRITTEN REQUESTS FOR INTERPRETATIONS OR CLARIFICATION:

No oral interpretations will be made to any firms as to the meaning of specifications or any other contract documents. All questions pertaining to the terms and conditions or scope of work of this bid must be sent in writing via e-mail to the County Properties office. Responses to questions may be handled as an addendum if the response would provide clarification to the requirements of the bid/proposal. All such addenda shall become part of the contract documents. The County will not be responsible for any other explanation or interpretation of the proposed RFB made or given prior to the award of the contract.

3. RIGHTS OF BENTON COUNTY IN REQUEST FOR BID PROCESS:

In addition to all other rights of Benton County, under state law, the County specifically reserves the following:

A. Benton County reserves the right to rank firms and negotiate with the highest-ranking firm.
B. Benton County reserves the right to select the bid that it believes will serve the best interest of the County.
C. Benton County reserves the right to accept or reject any and all bids.
D. Benton County reserves the right to cancel the entire request for bid.
E. Benton County reserves the right to remedy or waive technical or immaterial errors in the request for bid or in bids submitted.
F. Benton County reserves the right to request any necessary clarifications, additional information, or proposal data without changing the terms of the bid.
G. Benton County reserves the right to make selection of the Bidder to perform the services required on the basis of the original bid without negotiation.

4. EVALUATION CRITERIA:

The evaluation criteria define the parameters that will be used by the selection committee to evaluate and score responsive, responsible and qualified bids. The different evaluation parameters are shown in the chart below:

Item No.	Parameter
1	Specialized experience and technical competence of the firm with respect to the type of professional services required.
2	Capacity and capability of the firm to perform the work in question including specialized services, within the time limitations fixed for the completion of the project.
3	Past record of performance of the firm with respect to such factors as control of costs, quality of work and ability to meet schedules and deadlines.
4	Firm’s proximity to and familiarity with the area in which the project is located.

5. COSTS INCURRED BY BIDDERS:

All expenses involved with the preparation and submission of bids to the County, or any work performed in connection therewith, shall be borne solely by the Bidder(s). No payment will be made for any responses received, or for any other effort required of, or made by, the Bidder(s) prior to contract commencement.

6. ORAL PRESENTATION:

An oral presentation and/or interview may be requested of any firm, at the selection committee's discretion.

7. CONFLICT OF INTEREST:

A. The Bidder represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance or services required hereunder, as provided in Arkansas Code Annotated §14-14-1202.

B. The Bidder shall promptly notify Benton County in writing, of all potential conflicts of interest for any prospective business association, interest, or other circumstance which may influence or appear to influence the bidder's judgment or quality or services being provided. Such written notification shall identify the prospective business association, interest or circumstance, the nature of which the Bidder may undertake and request an opinion to the County as to whether the association, interest or circumstance would, in the opinion of the County; constitute a conflict of interest if entered into by the Bidder. The County agrees to communicate with the Bidder its opinion via e-mail or first-class mail within thirty days of receipt of notification.

8. WITHDRAWAL OF BID:

A bid may be withdrawn at any time.

9. LATE BID OR MODIFICATIONS:

A. Bid and modifications received after the time set for the bid submittal shall not be considered. Modifications in writing received prior to the deadline will be accepted. The County will not be responsible for misdirected bids. Bidders should contact the County Properties office at (479) 464-6168 to insure receipt of their submittal documents prior to opening time and date listed.

B. The time set for the deadline shall be local time for Bentonville, Arkansas on the date listed. All bids shall be received in the County Properties office BEFORE the stated deadline.

10. LOCAL, STATE AND FEDERAL COMPLIANCE REQUIREMENTS:

A. The laws of the State of Arkansas apply to any purchase made under this request for bid. Bidders shall comply with all local, state, and federal directives, orders and laws as applicable to this bid and subsequent contract(s) including but not limited to Equal Employment Opportunity (EEO), Disadvantaged Business Enterprises (DBE), & OSHA as applicable to this contract.

B. Pursuant to Arkansas Code Annotated §22-9-203 Benton County encourages all qualified small, minority and women business enterprises to bid on and receive contracts for goods, services, and construction. Also, Benton County encourages all general contractors to subcontract portions of their contract to qualified small, minority and women business enterprises.

11. COLLUSION:

The Bidder, by affixing his or her signature to this bid, agrees to the following: "Bidder certifies that his bid is made without previous understanding, agreement, or connection with any person, firm or corporation making a bid for the same item(s) and/or services and is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action."

12. RIGHT TO AUDIT, FOIA AND JURISDICTION:

A. Benton County reserves the privilege of auditing a vendor's records as such records relate to purchases between the County and said vendor.

B. Freedom of Information Act: County contracts and documents prepared while performing County contractual work are subject to the Arkansas Freedom of Information Act. If a Freedom of Information Act request is presented to Benton County, the (Contractor) will do everything possible to provide the documents in a prompt and timely manner as prescribed in the Arkansas Freedom of Information Act (§A.C.A. 25-19-101). Only legally authorized photocopying costs pursuant to the FOIA may be assessed for this compliance.

C. Legal jurisdiction to resolve any disputes shall be Arkansas with Arkansas law applying to the case.

13. COUNTY INDEMNIFICATION:

A. Due to the County statutory tort immunity, it doesn't carry liability insurance for such claims. Accordingly, any contract entered into with the successful bidder/candidate may not include a clause in which the County agrees that it or its' officials or employees will indemnify the other party.

B. The successful Bidder(s) agrees to indemnify the County and hold it harmless and against all claims, liability, loss, damage or expense, including but not limited to counsel fees, arising from or by reason of any actual or claimed trademark, patent or copyright infringement or ligation based thereon, with respect to the services or any part thereof covered by this order, and such obligation shall survive acceptance of the services and payment thereof by the County.

14. VARIANCE FROM STANDARD TERMS & CONDITIONS:

All standard terms and conditions stated in this request for bid apply to this contract except as specifically stated in the subsequent sections of this document, which take precedence, and should be fully understood by Bidders prior to submitting a bid on this requirement.

15. PAYMENT AND INVOICING:

The Bidder must specify in their bid the exact company name and address which must be the same as invoices submitted for payment as a result of award of this RFB. Further, the successful Bidder is responsible for immediately notifying the County Properties office of any company name change, which would cause invoicing to change from the name used at the time of the original RFB.

16. CANCELLATION:

A. The County reserves the right to cancel this contract without cause by giving thirty (30) days prior notice to the Contractor in writing of the intention to cancel or with cause if at any time the Contractor fails to fulfill or abide by any of the terms or conditions specified.

B. Failure of the contractor to comply with any of the provisions of the contract shall be considered a material breach of contract and shall be cause for immediate termination of the contract at the discretion of Benton County.

C. In addition to all other legal remedies available to Benton County, the County reserves the right to cancel and obtain from another source, any items and/or services which have not been delivered within the period of time from the date of order as determined by Benton County.

D. Any contract entered into with a successful bidder/candidate extending beyond the current budget year the County (which is the calendar year) is subject to non-appropriation. Accordingly, any contract entered into by the County must provide that in the event no funds or insufficient funds are appropriated for the continuation of the contract, the contract will end as of the last day for which funds were appropriated without penalty to the county.

17. ASSIGNMENT, SUBCONTRACTING, CORPORATE ACQUISITIONS AND/OR MERGERS:

A. The Contractor shall perform this contract. No assignment of subcontracting shall be allowed without prior written consent of the County. If a Bidder intends to subcontract a portion of this work, the Bidder shall disclose such intent in the bid submitted as a result of this RFB.

B. In the event of a corporate acquisition and/or merger, the Contractor shall provide written notice to the County within thirty (30) calendar days of Contractor's notice of such action or upon the occurrence of said action, whichever occurs first. The right to terminate this contract, which shall not be unreasonably exercised by the County, shall include, but not limited to, instances in which a corporate acquisition and/or merger represent a conflict of interest or are contrary to any local, state, or federal laws. Action by the County awarding a bid to a firm that has disclosed its intent to assign or subcontract in its response to the RFB, without exception shall constitute approval for purpose of this Agreement.

18. NON-EXCLUSIVE CONTRACT:

Award of this RFB shall impose no obligation on the County to utilize the vendor for all work of this type, which may develop during the contract period. This is not an exclusive contract. The County specifically reserves the right to concurrently contract with other companies for similar work if it deems such an action to be in the County's best interest. In the case of multiple-term contracts, this provision shall apply separately to each item.

19. ADDITIONAL REQUIREMENTS:

The County reserves the right to request additional services relating to this RFB from the Bidder. When approved by the County as an amendment to the contract and authorized in writing prior to work, the Contractor shall provide such additional requirements as may be necessary.

20. SERVICES AGREEMENT OR CONTRACT:

A written agreement, in substantially the form attached, incorporating the RFB and the successful bid will be prepared by the Bidder, signed by the successful Bidder and presented to Benton County for approval and signature of the County Judge.

21. INTEGRITY OF REQUEST FOR BID DOCUMENTS:

Bidders shall use the original RFB form(s) provided by the County Properties office and enter information only in the spaces where a response is requested. Bidders may use an attachment as an addendum to the RFB form(s) if sufficient space is not available on the original form for the Bidder to enter a complete response. **Any modifications or alterations to the original RFB documents by the Bidder, whether intentional or otherwise, will constitute grounds for rejection of such RFB response.** Any such modifications or alterations a Bidder wishes to propose shall be clearly stated in the Bidder's RFB response and presented in the form of an addendum to the original RFB documents.

22. <u>OTHER GENERAL CONDITIONS:</u>

A. Bidder must provide the County with their bids signed by an employee having legal authority to submit bids on behalf of the Bidder. The entire cost of preparing and providing responses shall be borne by the Bidder.

B. The County reserves the right to request any additional information it deems necessary from any or all Bidders after the submission deadline.

C. The request for bid is not to be construed as an offer, a contract, or a commitment of any kind, nor does it commit the County to pay for any costs incurred by Bidder in preparation. It shall be clearly understood that any costs incurred by the Bidder in responding to this request for bid is at the Bidder's own risk and expense as a cost of doing business. The County shall not be liable for reimbursement to the Bidder for any expense so incurred, regardless of whether or not the bid is accepted.

D. If products, components, or services other than those described in this bid document are proposed, the bidder must include complete descriptive literature for each. All requests for additional information must be received within five working days following request.

E. Any uncertainties shall be brought to the attention of Ms. Terry Lewis immediately via telephone (479) 464-6168 or by e-mail at Terry.Lewis@bentoncountyar.gov. It is the intent and goal of Benton County to provide documents providing a clear and accurate understanding of the scope of work to be completed and/or goods to be provided. We encourage all interested parties to ask questions to enable all bidders to be on equal bid terms.

F. Any inquiries or requests for explanation in regard to the County's requirements should be made promptly to Ms. Terry Lewis, Benton County, via e-mail at Terry.Lewis@bentoncountyar.gov or telephone at (479) 464-6168. No oral interpretation or clarifications will be given as to the meaning of any part of this request for bid. All questions, clarifications, and requests, together with answers, if any will be provided to all firms via written addendum. Names of firms submitting any questions, clarifications, or requests will not be disclosed until after a contract is in place.

G. At the discretion of the County, one or more firms may be asked for more detailed information before final ranking of the firms, which may also include oral interviews. NOTE: Each Bidder shall submit an "Authorized Negotiator Form" containing the signature of a duly authorized officer or agent of the Bidder's company empowered with the right to bind and negotiate on behalf of the Bidder for the amounts and terms proposed.

H. Any information provided herein is intended to assist the Bidder in the preparation of bid necessary to properly respond to this RFB. The RFB is designed to provide qualified Bidders with sufficient basic information to submit bids meeting specifications and/or test requirements, but is not intended to limit a RFB's content or exclude any relevant or essential data.

I. Bidders irrevocably consent that any legal action or proceeding against it under, arising out of or in any manner relating to this Contract shall be controlled by Arkansas law. Bidder hereby expressly and irrevocably waives any claim or defense in any said action or proceeding based on any alleged lack of jurisdiction or improper venue or any similar basis.

J. The successful Bidder shall not assign the whole or any part of this Contract or any monies due or to become due hereunder without written consent of Benton County. In case the successful Bidder assigns all or any part of any monies due or to become due under this Contract, the Instrument of assignment shall contain a clause substantially to the effect that is agreed that the right of the assignee in and to any monies due or to become due to the successful Bidder shall be subject to prior liens of all persons, firms, and corporations for services rendered or materials supplied for the performance of the services called for in this contract.

K. The successful Bidder's attention is directed to the fact that all applicable Federal and State laws, County and municipal ordinances, and the rules and regulations of all authorizes having jurisdiction over the services shall apply to the contract throughout, and they will be deemed to be included in the contract as though written out in full herein. The successful Bidder shall keep himself/herself fully informed of all laws, ordinances and regulations of the Federal, State, County and municipal governments or authorities in any manner affecting those engaged or employed in providing these services or in any way affecting the conduct of the services and of all orders and decrees of bodies or tribunals having any jurisdiction or authority over same. If any discrepancy or inconsistency should be discovered in these Contract Documents or in the specifications herein referred to, in relation to any law, ordinance, regulation, order or decree, he/she shall herewith report the same in writing to Benton County.

L. All Benton County properties are tobacco-free zones. Bidder, contractor(s), subcontractor(s) and all hired staff – whether part time or full time – shall abide by County rules. County Property includes interior of County buildings, exterior yards, lawns, parking lots, and picnic areas.

M. All charges **should** be included on the Official Bid Price Sheet(s) which includes all associated costs (including but not limited to delivery, freight, etc.) for the goods or services being bid. **Do not include sales taxes in prices.**

Section B: Vendor References

The following information is required from all Bidders so all bids may be reviewed and properly evaluated:

Company Name____
Business Address____
Number of years in business _________ How long in present location ____________________
Total number of current employees ______________ Full time _________Part time _________
Number of employees you plan to use to service this contract ______ Full time ___Part time ___

Please list local commercial and/or governmental references that you have previously performed similar contract services for within the past five (5) years:

1 Company Name: ____
City, State, Zip: ____
Contact Person: ____
Telephone: ____
Fax Number: ____
E-Mail Address: ____

2 Company Name: ____
City, State, Zip: ____
Contact Person: ____
Telephone: ____
Fax Number: ____
E-Mail Address: ____

3 Company Name: ____
City, State, Zip: ____
Contact Person: ____
Telephone: ____
Fax Number: ____
E-Mail Address: ____

4 Company Name: ____
City, State, Zip: ____
Contact Person: ____
Telephone: ____
Fax Number: ____
E-Mail Address: ____

Bidder must disclose any possible conflict of interest with Benton County, including, but not limited to, any relationship with any Benton County employee. Your response must disclose if a known relationship exists between any principal or employee of your firm and any Benton County employee or County elected official.

If, to your knowledge, no relationship exists, this should also be stated in your response. Failure to disclose such a relationship may result in cancellation of a purchase and/or contract as a result of your response. This form must be completed and returned in order for your bid to be eligible for consideration.

PLEASE CHECK ONE OF THE FOLLOWING AS IT APPROPRIATELY APPLIES TO YOUR FIRM:

_____________ **NO KNOWN RELATIONSHIP EXISTS**

_____________ **RELATIONSHIP EXISTS (Please explain)**

____

____

____

PRIMARY CONTACT INFORMATION

At the discretion of the County, one or more firms may be asked for more detailed information before final ranking of the firms, which may also include oral interviews. **NOTE: Each Bidder shall submit to the County a primary contact name, e-mail address, and phone number (preferably a cell phone number) the County Selection Committee can contact for clarification or interview via telephone.**

Name of Primary Contact:____
Title of Primary Contact:____
Phone number #1 (cell phone):____________________ Secondary Phone#:_________________
E-Mail Address:____

Is the primary contact (listed in part 1) able to legally bind contracts? YES NO (circle one)
If no, please list contact that can legally bind a contract for the firm:
Name:_______________________________________
Title:____
Phone #1 (cell phone):__________________________ Phone 2:__________________________
E-Mail Address:____

SPECIFICATIONS

It is the intent of these specifications to describe in sufficient detail to secure bids on comparable items. Any items not conforming to these specifications will be rejected, and it will be the responsibility of the bidder to conform to the requirements unless deviations have been specifically cited by the bidder and an acceptance made on the basis of the exception.

Human Resources Management/Payroll System & Services Specifications

Benton County will be making a decision based upon the best value in terms of both cost as well as the quality of the product and what it offers to the county.

OVERVIEW:

Are you a Public or private company?

Provide a brief history of your company.

What is your primary business focus?

Describe your target market.

For how many years has the system you are offering been released?

Explain your company culture.

Describe your target market.

How many HRIS/payroll clients do you have?

What is the average size of your customers?

FINANCIAL:

What is your company's annual sales/revenue?

How do you recognize revenue?

What percentage of your organization's revenue come from HRIS/payroll customers?

What percentage of your organization's revenue do you invest in Research and Development (R&D)?

What percentage of R&D is specific to your HRIS/payroll product?

Are there any outstanding lawsuits against your company? If so, please explain what impact an unfavorable outcome would have on the company.

TECHNOLOGY/ARCHITECTURE:

Provide a brief overview of your products with a summary of the functionality. Indicate if the product was developed by your company or purchased.

What is the core product of your business?

What separates your product from your competition?

Provide an overview of your system architecture.

Describe your workflow services.

Describe your customization and extensibility capabilities.

Describe your system's ability to have customers "configure" the system vs. having you "customize" the system to meet their needs.

Describe your security architecture, including any significant failures, breaches or issues encountered in the last five years.

Define your system architecture, as well as hardware, and "other" software requirements.

Who are your technical partners?

Provide a description of your company's disaster recovery options.

Describe how your organization provides periodic system performance evaluations for all installed applications. Identify ways to improve system utilization and improve overall performance. How frequently are these evaluations done and what is the cost?

How does your company stay current with technology?

Provide a schematic diagram of the proposed system architecture.

How many concurrent users can your product support?

Does your application provide for server-side processes? If so, describe these processes.

Are both the front-end and back-end fully 64 bit? If not, what is the makeup?

Is your application compiled or interpreted? Specify the ratio of compiled code versus interpreted code.

What network operating systems are supported?

What type of network does your web module utilize?

Do you consider your proposed architecture to be “open”? Please explain.

How is system auditing implemented in the application? Is this server side or client side?

Does the proposed system support XML web services?

Does the application have SharePoint integration capability?

Does the application support a Client Object Model?

Does the application design support web-parts?

Describe your multi-layered architecture for scalability and extensibility.

Detail the application response times, benchmarks for processes such as payroll processing, screen navigation, report generation, etc.

Describe how the application supports page linking and custom ASP pages.

Describe how your system complies with applicable federal, state and local laws, regulations or ordinances.

Describe your systems international capabilities.

Please provide the methods supported for disaster recovery and data achieving.

PRODUCT DEPLOYMENT:

Do you offer your products as Licensed, Hosted, SaaS or all three?

If you offer a Hosted and/or a SaaS model, what is your target market?

If you offer a Hosted and/or a SaaS model, why should we select it?

If you offer a Hosted and/or a SaaS solution, what is the data center and network infrastructure?

If you host the application, what types of technical resources are required?

Provide a brief description of the security measures you provide in your hosting and/or SaaS environment.

If data centers are physically secured, explain the method/technology used.

Does your hosting solution include a guaranteed level of system performance, such as sub-second response time?

Describe your customer support process for application hosting or SaaS customers.

If Hosted and/or SaaS, what control would we have with making application modifications – screens, tables and fields?

PRODUCT OVERVIEW:

Provide a brief overview of your product offerings.

How do you differentiate yourself from your competition?

Who are your product partners?

How do you stay current with changes in human resources?

What enhancements are planned for your product over the next three years?

Please specify the name and version of the HRIS/payroll system considered in this RFP.

PRODUCT FUNCTIONALITY

Please use the following matrix as a key for responding to the functionality tables in the RFP.

Response Code	Description
Y - Existing	Feature is delivered as standard functionality in the proposed version of the software and can be demonstrated by the vendor.
	Feature is not currently included but will be available in a future

F - Future *	release. Please indicate time frame (e.g., 12 months).
C - Customer Customization *	Not included. Tools are provided for customization at no additional cost.
V - Vendor Customization *	Not included. Vendor provides customization at an additional cost.
T - Third Party *	Feature is provided by a third-party partnering arrangement. Indicate any preferred partner agreements.
N - Not Available	Requirement cannot be met.

ENTERPRISE STRUCTURE:

How does your HRIS/payroll system support multiple companies?

How does the system handle acquisitions and mergers? Specifically, what is required to add a new company to the system?

Are you a global provider? If yes, please provide your definition of global. Is this provided through a 3rd party.

Describe employee transfers between and/or within companies.

Describe how a cost center [job number / activity number] is added and deleted in your system.

	Requirements	Code	Comments
1.	Supports multiple companies in one database		
2.	Supports individual tax filings by EIN		
3.	Provides capability to view all employees simultaneously regardless of EIN association or separately by company or division		
4.	Reports on all EINs without having to consolidate data		
5.	Reports on actual from check history		
6.	Provides for client defined organizational levels		
7.	Provides Web portal communication to all people in the organization		
8.	Provides Web portal communication to a specific company		
9.	Provides for the posting of company specifics, such as policies and forms, in the Web portal		
	Provides employee searches by:		
10.	Employee Number		
11.	Last Name & First Name		
12.	Organizational Level		
13.	Company		

	Requirements	Code	Comments
14.	Location		
15.	Status		
16.	Job		
17.	Pay Group		
18.	Department Manager		
19.	Supports multiple languages		
20.	Supports multiple currencies		

Organization Structure

Explain how/if your system creates organization charts.

Describe how your system maintains associate "report to" data.

Describe how your system handles/manages large reorganizations.

	Requirements	Code	Comments
1.	Provides ability to export data to an organizational charting application.		
2.	Structures the organizational chart based on the reporting relationships defined for each associate.		
3.	Provides an on-line organization or report to chart.		
4.	Establishes new organization entities (i.e., companies, cost centers, etc.) without vendor professional services.		
5.	Adds/changes organization entities and easily transfers associates within and/or across entities (including companies).		
6.	Manages organization restructuring including position control and salary changes.		
7.	Provides the ability to establish exports to create organization charts for:		
8.	Companies		
9.	Locations		
	Pay groups		
10.	Departments within company		

GLOBAL:

Are you a global provider? If yes, please explain.

What languages are supported within the standard product? List additional languages available as add-ons.

Please explain the extent to which the product meets regional and country-specific requirements for human resources processes and information. List the countries supported by localizations, shipped as add-ons.

How does your solution support global capabilities for employee records, currencies, and compliance with international data privacy?

RECRUITING AND APPLICANT MANAGEMENT:

Provide a brief description of your recruiting and applicant management system.

Describe your candidate pre-screening or qualification process.

What job boards are supported with your product? Describe how jobs are posted to Internet job

Does your system allow for an automatic e-mail response to applicants and candidates? If so, please describe the communication types included in the application. Can we customize the responses?

How is an applicant transitioned to an employee in your system? If the systems are integrated, describe the file transfer process and the technology applied.

How does an applicant apply for a job online?

	Requirement	Code	Comments
1.	Communicates automatically with job boards.		
2.	Posts internal and external jobs to company Internet site and company intranet site with effective dates.		
3.	Has a requisition library of job templates that can be utilized when creating requisitions.		
4.	Tracks expenses by applicant/candidate level and associate them with a specific requisition or a general recruiting activity.		
5.	Sends automatic responses, notifications, or e-mails to applicants/candidates.		
6.	Allows administrators to customize verbiage on the e-mail messages (including confirmation acknowledgement and job filled) to external and internal applicants/candidates		
7.	Allows users to e-mail potential interview times, applications, corporate material, job opening status.		
8.	Provides a library of standard communication correspondence for printing and distribution.		
9.	Integrates seamlessly with standard e-mail systems (Microsoft Outlook, Lotus Notes) for applicant/candidate activity for hiring managers and recruiters.		
10.	Allows administrators to schedule interviews, notify		

	Requirement	Code	Comments
	interviewers of times, locations and topics to cover.		
11.	Distinguishes applicant/candidate status for internal or external candidates.		
12.	Associates applications and resumes to a specific requisition without having to change screens/databases.		
13.	Has history that consists of one candidate record with all the associated recruiting activity regardless of the number of requisitions.		
14.	Can a resume/application be maintained in the system?		
15.	Can a resume/application be searched using key words?		
16.	Stores resumes for future use by category, job title, skill, or other user-defined attributes.		
17.	Allows applicants/candidates to modify or replace their existing resume.		
18.	House interview question templates for each job		
19.	Hiring managers and recruiters can review pre-screened applicant/candidate		
20.	Hiring managers and recruiters can track applicant/candidate status		
21.	Hiring managers and recruiters can schedule interviews		
22.	Hiring managers and recruiters can communicate with applicants/candidates via e-mail		
23.	Hiring managers and recruiters can view communication history		
24.	Hiring managers and recruiters can report on communications		
25.	View multiple recruiter schedules		
26.	Hiring managers and recruiters can view and print assessments between applicants/candidates		
27.	Hiring managers and recruiters can view and print applicant/candidates job history, qualifications and resume		
28.	Hiring managers and recruiters can record interview notes		
29.	Hiring managers and recruiters can enter additional applicant /candidate information if needed		
30.	Searches applicants/candidates based on a variety of criteria (e.g., location, skills, prior employers, zip code, and metropolitan areas).		
31.	Has embedded workflow for approvals based on company-defined process including requisition approval, offer approval, and new hire approval.		
32.	Allows users to attach documents to an applicant/candidate record.		
33.	Provides Web-based data collection for jobseeker users (both employee and non-employee)		

	Requirement	Code	Comments
34.	Allows administrators to create behavioral interview question sets per job opening		
35.	Allows administrators to determine which fields are required for completion by applicant/candidate and/or recruiters/hiring managers.		
36.	Allows administrators to establish access levels in the system by role (i.e., administrator, recruiter, hiring manager).		
37.	Increments requisition numbers automatically or entered manually.		
38.	Allows users to enter and access secure Notes.		
39.	Integrates with third-party screening services including: criminal background check, drug testing and assessments.		
40.	Allows applicant/candidate to choose if he/she would like to be alerted when a future position becomes available based on qualifications.		
41.	Generates offer letters containing all compensation options to applicant/candidate		
42.	Job openings will track the requisition number, status and reason for the opening		
43.	Job openings will include employment information including FLSA type, salary range, and full/part time indicator.		
44.	Job opening will include education and skill requirements.		
45.	Assist in the creation of and house job descriptions.		
46.	Job opening will include Metropolitan Area and location information.		
47.	Generates reports on all fields that exist in the database.		

HIRING:

Describe your employer configurable new hire workflow.

	Requirement	Code	Comments
1.	HR and manager new hire/rehire checklist ability, by position, with check-off ability as tasks are completed (for example, offer letter has been sent and received).		
2.	Provides ability to automatically notify other areas of organization of new hire (security, payroll, etc.)		
3.	Provides ability to automatically notify new hire of activities they need to complete and remind them if they don't do them in a timely manner.		
4.	Manager is prompted to assign correct property to the		

	Requirement	Code	Comments
	employee.		
5.	Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		

TERMINATION:

Describe your employer configurable termination workflow and how it supports termination of employees and independent contractor assignments.

How is your system used to notify appropriate areas of the organization (security, IT, payroll) that an employee or independent contractor has been terminated?

	Requirement	Code	Comments
1.	Enables manager self-service request for termination workflow.		
2.	Tracks terminations by reason (e.g. discharged, better opportunity, etc.), date, rehire eligibility, COBRA election.		
3.	Can the termination workflow be different based on the termination reason, or other termination criteria?		
4.	Maintains exit interview information.		
5.	Can automatically cancel specified employee benefits upon termination.		

ONBOARDING:

Please provide a brief overview of your onboarding solution.

What are examples of the forms your solution supports that are typically completed by the hiring manager and/or new hire?

Please provide examples of how your solution assists in conducting employment verification.

10.	Onboarding Requirements	Code	Comments
10.1	Ability to predefine workflows and workflow tasks that vary according to the position being filled.		
10.2	Ability to delegate a proxy or change the owner for any specific task.		
10.3	Ability to track expected lead times vs. actual lead times to assist in planning (e.g., to determine the lead times for telephone provision is 72 hours).		
10.4	Ability to output a well-formatted completed form to hard copy print.		
10.5	Ability for hires to return and update or correct their information after the initial submission.		

10.6	Ability to provide task response and status via email reply.		
10.7	Ability to measure the performance of the onboarding process.		
10.8	Ability to vary the onboarding process workflow according to multiple candidate and position factors — employee type, business unit, job function, country and state, etc.		
10.9	Ability to monitor the overall status of the onboarding process, providing a clear indication of "new hire readiness."		
10.10	Ability to make completion of one task a firm prerequisite to the initiation of other tasks.		
10.11	Ability for the hiring manager to enter all required data on behalf of the contingent worker.		
10.12	Ability to pre-populate form fields using data provided by unified Recruitment.		
10.13	Ability to brand the forms and pages seen in the new hire portal or page flow.		
10.14	Ability to automatically notify other areas of organization of new hire (security, payroll, etc.).		
10.15	Ability to close the requisition tracker — does the new hire automatically close the open requisition?		
10.16	Ability to facilitate automation of new hire paperwork collection and new hire responses for all businesses within the company.		
10.17	Ability to link to person prior to bringing on board to enable new hire process to begin earlier.		
10.18	Ability for HR and manager new hire/rehire to create/access checklist, by position, with check-off ability as tasks are completed (e.g., offer letter has been sent and received).		
10.19	Ability to automatically notify new hire of activities he/she needs to complete and then send reminder he/she does not complete these in a timely manner.		
10.20	Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		
10.21	Ability to click a button to hire the person, and data is automatically routed to payroll, benefits, and other applicable areas.		
10.22	Ability to interface employee's I-9 to e-verify for United States.		
10.23	Ability to generate acceptance email notice/workflow notification to hiring manager, with start date.		
10.24	Ability to include range of documents, such as W-4, I-9, employee agreement, non-compete agreement, etc.		
10.25	Ability to provide electronic new hire packets, with ability to attach.		

10.26	Ability to deliver employment eligibility verification, with automatic status update and validation noted in employee profile.		
10.27	Ability to print a new hire package for candidate's signature as well as workflow to generate appropriate pre-employment forms to be sent to the candidate.		

HUMAN RESOURCES:

Describe your system's HR functionality.

Is this system integrated with the payroll system?

When was this human resource product developed?

Was this application developed in-house or purchased?

Describe the types of historical information your system maintains (including number of years maintained).

How do you support electronic signatures?

Describe the HR process for transferring an employee between departments and/or companies.

Are there duplicate fields in both HR and Payroll that can be updated and modified? What is the timing? Describe how it works.

Explain how a "re-hire" is identified and how previous history and years of service are recognized.

Can electronic files and scanned documents be stored by associate on your system? What limitations, if any, exist?

Describe the process to terminate an associate on the system.

Describe how your system can trigger events beyond pay for terminated employees (e.g., remove system access, revoke access cards, remove PIN numbers for wire transfers, etc.).

Describe how a terminate action can be reversed on the system.

	Requirement	Code	Comments
1.	Provide on-line support/instructions for completion of routine tasks.		
2.	Establish new organizational entities (e.g., companies, cost centers, and other variables) with no IT or programming required.		
3.	Add/change organizational entities and easily/effectively transfer employees within and/or across them.		
4.	Maintain employee demographic data for all employment-related details (e.g., birth date, employee number, gender, hire date, contact information).		
5.	Maintain ethnic, visa, and I-9 related data.		
6.	Maintain marital, family, and dependent/beneficiary related and tax-related elections.		
7.	Maintain historical data for current/former employees (e.g., names, employment, job/assignments, performance ratings, status, and pay).		
8.	Maintain audit trails of employee file and data updates by date, time, and origin of update.		
9.	Generate, identify, and track employees by unique employee number. Track Social Security Number for U.S. based employees.		
10.	Maintain language, education, and certification data.		
11.	Establish jobs/roles/positions and all relevant details.		
12.	Maintain data for all job-related details (e.g., grade, exemption status, EEO code, salary, job family).		
13.	Make simultaneous changes to large employee groups (e.g., new hires, salary changes, transfers).		
14.	Enable effective/future dating of pending transactions/events, and maintain transaction history.		
15.	New hires automatically routes approval based on company's hierarchy.		
16.	Routes job/salary changes electronically for approval based on user defined approvals.		
17.	Managers can view and change employee salary information with workflow.		
18.	Managers can submit new hires.		
19.	Managers can run reports.		
20.	Managers can create ad-hoc reports based on security access.		
21.	Managers can view employee training and employment records.		
22.	Progressive disciplinary actions can be tracked and		

	Requirement	Code	Comments
	reported.		
23.	E-mail alerts can be generated based on system or user defined events.		
24.	Data/transactions submitted by managers automatically validate for accuracy and completeness.		
25.	Life-to-date history on all employee fields.		
26.	Audit trails for all additions, updates and changes.		
27.	Retains employee status code history.		
28.	Narrative history (e.g., disciplinary actions, grievances).		
29.	No limit to historical data captured.		
30.	Unlimited user defined fields.		

COMPLIANCE:

As human resource regulations change, how do you ensure your clients stay in compliance?

Explain how your system maintains OSHA logs.

Describe how the software facilitates the maintenance of employee data and creation of employee history.

	Requirement	Code	Comments
1.	Changes to compliance requirements are maintained and updated by HRIS vendor.		
2.	All compliance reporting can be generated for current periods and historical periods.		
	Standard compliance reports include:		
3.	EEO-1		
4.	OSHA 300 and OSHA 301		
5.	Multi-Worksite Reports		
6.	Vets-100		
7.	Automatic notification of I-9 expiration/visa expiration.		
8.	COBRA qualifying events are automatically triggered based on employee transactions.		
9.	COBRA letters can be generated from the system.		
10.	Tracks any accommodations made to support the American with Disabilities Act (ADA).		
11.	Tracks ADA and disability information.		
12.	Provides military and veteran status for employees.		
13.	Includes affirmative action compliance features.		
14.	Provides HIPAA support.		
15.	Provides worker’s compensation support.		
16.	Creates separate, mandated government reports for each		

	Requirement	Code	Comments
	individual tax entity.		
17.	Includes state-mandated “New Hire” reports (for child support payment tracking).		
18.	Updates from HRIS vendor when federal/state/local regulations change.		

PERFORMANCE APPRAISAL:

Please describe your performance appraisal feature.

Describe how the system can provide real time monitoring of performance appraisals.

Can completed performance reviews be attached to an employee record?

Can another performance appraisal system be integrated with this module?

	Requirement	Code	Comments
1.	Delivers configurable comprehensive options to allow administrators to configure the performance review process to their specific business needs without the need for technical or consultative services.		
2.	Intuitive user experience that eliminates the need for end-user training for administrators, employees, and managers.		
3.	Solicits performance feedback from multiple reviewers (e.g., subordinates, directors, other managers, peers) and exchanges data among multiple users simultaneously.		
4.	Saves work in process/draft reviews and provides option to return to complete.		
5.	Enables administrators to assign different review forms for different employees within the same review cycle.		
6.	Enables employees to complete self-evaluations.		
7.	Tracks performance review status and dates (e.g., complete, incomplete).		
8.	Provides email reminders and overdue notices throughout the process.		
9.	Maintains performance feedback and ratings history.		
10.	Provides historical reviews that can be accessed easily by managers or administrators.		
11.	Enables administrators to view the status of the review process at any time.		
12.	Provides delivery of standard competencies and objectives.		
13.	Provides goals management that allows either the		

	Requirement	Code	Comments
	employee or manager to create and add their own personal goals or objectives.		
14.	Enables individual weighting of goals.		
15.	Provides ability to assign employee performance objectives that align with your overall business strategy.		
16.	Provides access to all talent factors, including employee information, review history, skills and competencies, education, salary history, and learning history, based on role.		
17.	Enables reporting and analysis of performance ratings for various employee groups (e.g., by job, manager, geography).		
18.	Provides a centralized gateway for managers to monitor the progress of their performance management activities — in one place.		
19.	Summarizes performance review in an easy-to-read format that can be printed for future reference.		
20.	Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		
21.	Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		

SUCCESSION MANAGEMENT:

Please provide a brief overview of your succession management functionality.

Please explain how Succession Management is unified with your Performance Management and Career Development offerings.

Please explain how succession plans are created.

How much historical information is available?

What types of reporting and metrics are available on the succession data?

	Succession Management Requirements	Code	Comments
1.	Stores multiple iterations of possible succession plans for each team/leader.		
2.	Provides printable/PDF capabilities.		
3.	Allows configurability by the client (ASM) or allows hard-coding		

	from the vendor.		
4.	Provides the ability to track and report on critical roles and critical talent.		
5.	Delivers robust reporting, including exception reporting.		
6.	Provides the ability to track core competencies associated with next/future job.		
7.	Provides the ability to track the date/timeframe an employee will be ready for the next position.		
8.	Provides the ability for employees and managers to create a development plan based on license, skills, training, education, and competencies.		
9.	Provides the ability to track multiple language proficiency information, including speaking, reading, and writing, for each employee.		
10.	Provides the ability to maintain multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.		
11.	Provides the ability to track and search on the following data:		
12.	skill description		
13.	experience level		
14.	proficiency level		
15.	competency description		
16.	Provides the ability to track employee licenses and certification and expiration dates.		
17.	Provides the ability to track employee professional associations. Specify limit.		
18.	Provides the ability to identify where employees are in their current performance and potential growth.		
19.	Provides the ability to provide audit records.		
20.	Provides the ability to be delivered with standard competencies and objectives. Administrators should be able to add and modify client-specific, effective-dated competencies,		
21.	Enables the graphic display of the manager's direct report organization.		

COMPENSATION:

Provide an overview of the key compensation features of your system.

How is the compensation features integrated with the HRIS and payroll functions?

Explain how your system creates and retains salary history.

What types of reports are available for compensation?

Describe how your system manages poll worker pay.

Describe how your system manages bonus pay.

Describe how your system manages incentive pay.

Describe how your system manages separation pay and other discretionary pay.

Explain how pay changes are entered in the system.

Describe how a mid-period salary change is processed.

Explain how the system allows managers to plan salary increases online, process approvals via workflow, and automatically implement increases on the effective date.

Explain how annual merit increases are processed in your system.

Does your system validate minimum and maximum salary (of grade) when pay is changed, and provide warning messages as needed?

How is compensation modeling handled in your system?

Describe how salary ranges/grades are established in the system, grades are assigned to positions, and positions are assigned to associates.

Describe how salary range/grade changes are made in the system, those changes are reflected in positions, and to associates assigned to those positions.

Explain how job information is established and maintained in your system (e.g., grade, exemption status, EEO code, etc.).

Explain how your system calculates, displays, and reports compa-ratio and/or quartile information.

Explain how the same job can have different salary ranges based on job location.

BUDGET:

Please describe how your budget administration tool will assist our organization with effective decisions regarding future compensation.

What are the steps involved in creating a budget worksheet for your managers?

	Requirement	Code	Comments
1.	Managers can view summary data and analyze salary budget information for their departments.		
	Managers can assign salary increases based on:		
2.	Dollar amounts		
3.	Percentages		
4.	Combination of dollar and percentages		
5.	Managers can create “what if” employee scenarios to ensure that increases do not exceed the department salary		

	Requirement	Code	Comments
	budget.		
6.	Managers can apply “across the board” salary increases for a department.		
7.	Managers can allocate different percentages and/or dollar amounts to different employees.		
8.	Assign multiple salary increases to one employee (i.e., cost of living and merit increases).		
9.	Rate changes and increases are effective-dated for payroll processing.		
10.	Manager can plan for compensation, overtime, taxes and benefits.		
11.	Manager can utilize advanced functions to calculate benefits (nested if/then statements, etc.)		
12.	Manager can plan for pre-tax benefits.		
13.	Manager can set budget using FTE or Headcount.		
14.	Manager can plan for terminations, leaves, and new hires.		
15.	Managers can plan for transfers between locations, departments and sections.		
16.	Managers can plan for temporary, part time, half time employees.		
17.	Managers can plan for temporary employees from an outside agency.		
18.	Manager’s view of budget can be restricted to their respective departments/offices.		
19.	Budget Data can be exported to excel.		
20.	Current and prior year payroll data is accessible in the budget planning module.		
21.	Manager can generate variance reports to compare budget to actual expense.		
22.	System maintains historical budget records.		
23.	Budget assumes all existing comp, taxes and benefits remains the same, then allows for overrides as necessary.		
24.	System allows data to be compiled for multiple companies and currencies.		
25.	System allows all currencies to be reported in USD, using a pre-determined exchange rate.		
	System has reporting capabilities:		
26.	Company		
27.	Location		
28.	Department		
29.	Title		
30.	Section of Law		
31.	Status		

	Requirement	Code	Comments
32.	Currency		
33.	Compensation Only		
34.	Benefits & Taxes Only		
35.	Employee versus Employer Expense		

EMPLOYEE RELATIONS:

Please describe how disciplinary actions are accommodated.

Please describe your capabilities to track grievances.

	Requirement	Code	Comments
1.	Tracks disciplinary actions including a description of the incident.		
2.	Managers and HR staff can record the type of action taken (i.e., written warning, verbal warning, termination).		
3.	Records required follow-up steps and the time frame for completion.		
4.	Schedules review of employee response to actions.		
5.	Grievances can be viewed in summary format.		
6.	Managers can drill into specific grievances.		
7.	Tracks the date and type of grievance (i.e., inequality, unfair pay, unfair working conditions).		
8.	Tracks final outcome of the grievance and the date it was closed.		

EMPLOYEE DEVELOPMENT:

Please describe how employee development and succession planning are accommodated in your system.

Describe how the employee development feature is used by employees.

	Requirement	Code	Comments
1.	Tracks core competencies associated with next/future job.		
2.	Flags employees that are recommended for a specific job.		
3.	Tracks the date an employee will be ready for the next position.		
4.	Managers can create a career plan based on license, skills, training and education.		
5.	Tracks multiple language proficiency information including speaking, reading, and writing, for each		

	Requirement	Code	Comments
	employee.		
6.	Maintains multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.		
7.	Does the system track the following data?		
8.	Skill code		
9.	Skill description		
10.	Experience level		
11.	Proficiency level		
12.	Last date skill used		
13.	Tracks employee licenses and certification and expiration dates.		
14.	Tracks employee professional associations. Specify limit.		

OSHA and Safety:

	Requirement	Code	Comments
1.	Maintains OSHA logs at the employee level.		
2.	Can view a summary page/window showing all incidents for an employee.		
3.	Can view the detail of an individual employee incident.		
	Incident details include:		
4.	Accident or exposure itself		
5.	Date and time		
6.	Days away from work		
7.	Days of restricted work		
8.	Illness or injury		
9.	Complete incident description		
10.	Ability to add notes.		
11.	Case number may be auto incremented.		
12.	OSHA reports are included as standard reports (OSHA 300, and OSHA 301).		
13.	All incident history is maintained indefinitely.		
14.	Incident information and history are accessible through reporting.		
15.	Managers can view and update OSHA information using Manager Self- Service.		
16.	Maintains required safety reporting for international operations.		

ORGANIZATION CHARTS:

Explain how your system creates organizational charts.

Describe how your system maintains employee "report to" data.

Describe how your system handles/manages large reorganizations.

	Requirement	Code	Comments
1.	Provides ability to export data to an organization charting application.		
2.	Provides a standard employee export that provides data in the required format.		
3.	Generates organization chart without requiring the user to make any changes.		
4.	Provides ability to create more customized export templates.		
5.	Structures the organization chart based on the reporting relationships defined for each employee.		
	Provides the ability to establish different export records to create organization charts for the following:		
6.	Various companies		
7.	Locations		
8.	Pay groups		
9.	Organization levels (by using the company and data selector options).		
10.	Tracks open positions in the organization chart.		

BENEFITS:

Describe the integration between benefits and payroll.

How does your system handle benefits administration?

Explain how your system facilitates reporting to third party vendors such as benefit providers.

Does the benefit data automatically populate in payroll? Is it real-time or a batch process?

Does your system have a module to maintain Worker's Compensation Claims, Costs, tracking lost time, restrictions, legal reporting requirements, regular reporting, etc.? Does the system allow for tracking of all notes, conversations, etc.?

Does the system allow for tracking of all notes, conversations, etc.?

How do you support electronic signatures?

	Requirement	Code	Comments
1.	Provides total integration between benefits and payroll including other payroll vendors.		
2.	Maintain calculations and limits in compliance with federal legislation.		
3.	Assigns different benefit packages to different groups of employees based on eligibility rules.		
4.	Establishes benefit/deduction plans with multiple types and options.		
	Supports effective dated:		
5.	Benefit/deduction plans		
6.	Employee benefit/deduction plan enrollment		
7.	Employer benefit/deduction plan enrollment		
8.	Updates benefit/deduction plans based on employee status change.		
9.	Tracks "waived" benefit/deduction plans.		
10.	Assigns a rate schedule to apply new rates with future effective dates for the new plan year.		
11.	Without writing a separate program, automatically updates premiums for age/salary driven benefit calculations.		
12.	Automatically enrolls employees in required plans.		
13.	Automatically cancels specified employee benefits upon termination.		
14.	Allows benefit costs to be set up for the new year while continuing processing for the current year.		
15.	Tracks and maintains information for dependents and beneficiaries.		
16.	Calculates imputed income.		
17.	Tracks and reports workers' compensation claims.		
18.	Facilitates reporting to third-party vendors such as benefit providers.		
19.	Provides one screen that shows employee data ("benefits-at-a-glance"), without having to scroll through multiple screens.		
20.	Defines and maintains benefit/deductions for the employee and employer		
21.	Includes automated schedules for benefits/deductions.		
22.	Supports benefit/deduction goals and limits.		
23.	Supports "catch up" contributions on deferred compensation plans.		
24.	Recovers benefit/deduction amounts that have been put into arrears.		
25.	Supports multiple arrear types.		

	Requirement	Code	Comments
26.	Includes defined start and stop dates for benefit/deduction.		
27.	Processes one-time benefit/deductions.		
28.	Maintains and tracks savings bond benefits/deductions.		
29.	Restricts participants from receiving more than the annual limit for reimbursement accounts including 457(b) plan.		
30.	Includes pre-tax and post-tax benefits/deductions.		
31.	Supports a designated default amount for each deduction code.		
32.	Supports multiple types of life insurance, long term disability, and short-term disability.		
33.	Supports flexible spending accounts (FSA).		
	Display flexible spending account information such as:		
34.	Plan information		
35.	Balance of funds in account (s)		
36.	History of transactions for reimbursements		
37.	Maintains updated FSA balance.		
38.	Includes minimum check option for FSA.		

OPEN ENROLLMENT:

Describe the system capabilities for online benefits enrollment (e.g., eligibility rules, tenure or grade level-based premiums, plan dates).

Describe how your self-service solution can be used to guide employees through benefits enrollment.

What tools do you have available for benefit administrators to monitor and provide a smooth enrollment process for the company and its employees?

Is workflow associated with benefit enrollment and life event changes?

	Requirement	Code	Comments
1.	System provides next-year enrollment capability while in current year.		
	From a Web browser, employees can:		
2.	View current benefits and related information.		
3.	Compare current benefits to the new benefits employees may choose to elect.		
4.	Compare the cost of current versus new benefits.		
5.	Make benefit elections from a list of eligible benefits.		
6.	Keep existing benefit elections with no changes.		
7.	Modify existing benefit elections.		
8.	Make new benefit elections to replace existing		

	Requirement	Code	Comments
	benefits.		
9.	Waive or decline benefits.		
10.	Review, add, modify and remove dependents and beneficiaries.		
11.	Review benefits and summary description documents.		
12.	Link to benefit plan provider Web sites for additional information to help in making informed benefit and provider choices.		
13.	Save "in progress" enrollments and then later return to modify choices, make additional elections and complete the enrollment process.		
14.	Make life event (e.g., baby, marriage) benefit changes.		
	From a Web browser, managers can:		
15.	Describe benefit plans and include specific plan details.		
16.	Include customized messages to employees on enrollment pages, (e.g., new benefit notifications, additional instructions, deadlines for completion, disclaimer for those employees who decline a benefit).		
17.	Specify the display order in which each benefit plan is viewed by the employee.		
18.	Identify required and optional activities that designate an active versus passive enrollment.		
19.	Limit the number of dependents to the employee for each benefit plan offered.		
20.	Limit the number of dependent relationships to the employee for each benefit plan offered.		
21.	View the statuses of all enrollments.		
22.	Drill into benefit groups and plans to check specific enrollment information such as a list of employees whose enrollments are completed, in progress, or not yet started.		
23.	Add or modify employee elections.		
24.	Send due date reminders using an integrated e-mail feature.		
25.	Use a "manage paperwork" feature to track requests for additional information or paperwork (e.g., proof that a dependent is enrolled in school, required Evidence of Insurability form).		
26.	Create Internet links to benefit plan provider Web sites so employees can obtain additional details to		

	Requirement	Code	Comments
	help them make informed choices.		
27.	Attach enrollment worksheets for employees to use when making life event benefit changes.		
28.	Report and track benefits-related information and activities as they relate to new hires, benefit group changes, dependents, session setup, employee elections, and terminations.		
29.	Export employee enrollment data (e.g., 457(b) plan), to a ready-to-send file that can be transmitted to appropriate plan providers or third-party administrators prior to the plan effective date.		
30.	Supports default benefits which can be set up for new hires.		
31.	Supports unique enrollment dates for each benefit plan.		
32.	Provides a next year enrollment capability.		
33.	Provides ability to report life event (e.g., marriage) and allow “eligible” changes to benefit elections.		
34.	Allows updates to dependent information for life events.		

LIFE EVENTS

Please describe the life events that come standard without configuration.

Describe how the available life event options are established and maintained in your system.

	Requirement	Code	Comments
1.	Allows online enrollment form for associates to use when making life-event benefit changes.		
2.	Supports life events processed through the associate self-serve function of the system.		
3.	Provides online ability to make life event changes (marriage, birth of a child, death, divorce).		
4.	Automatically prompts “eligible” changes to benefit elections when life event change made.		
5.	Allows update to dependent information for life events.		
6.	Allows removing a dependent.		
7.	Alerts student status end date to associate and employer		
8.	Allows update address changes.		
9.	Allows change in marital status.		

LEAVE ADMINISTRATION

How are leaves of absence identified and processed in the system? i.e. Personal Leave (PL) and Family and Medical leave Act (FMLA)

Explain how your system facilitates handling the provisions of the Family and Medical Leave Act (FMLA).

Explain how you coordinate and manage FMLA with STD management. Describe in detail how the communication and workflow would operate.

Describe how the system maintains leave of absence history records, time/hours used, including multiple leaves in a 12-month period so time off does not exceed maximum time allowed.

Describe how your system monitors workers' compensation and the related leave of absence

Describe the benefit premium collection process when associates are on leave without pay.

How are leave associates notified about open enrollment and their benefit elections processed?

	Requirement	Code	Comments
1.	Supports leave types		
2.	Supports maximum duration of leave types and combined leaves, i.e. FMLA to PL, etc.		
3.	Tracks due dates of Certification of Healthcare Provider Form by associate		
4.	Tracks the approved date when the associate's leave of absence is expected to start.		
5.	Tracks the approved date when the associate is expected to return from the leave.		
6.	Tracks and reports cumulative FMLA/PL time taken.		
7.	Maintains leave of absence history.		
8.	Calculates the planned duration, based on expected end and expected start dates.		
9.	Supports workflow approval processes for leave requests initiated by associates or managers.		
10.	Displays warning message during pay processing if time entered exceeds the leave balance.		

Paid Time Off (PTO), Vacation, Personal Day, Sick, Comp Time

Can employees request PTO?

Describe how your system calculates accrued PTO. Can it handle multiple types of "time off" accounts (i.e. PTO, VAC, Sick, Comp Time, Personal Day & Bereavement)?

	Requirement	Code	Comments
1.	PTO accruals and leave administration can be processed without Time and Attendance feature.		
2.	PTO plans can be configured for a lump sum accrual on an annual basis.		
3.	PTO plans can be configured to accrue based on length of service and user defined rates.		

	Requirement	Code	Comments
	PTO plans can be configured to accrue based on user-defined frequencies.		
4.	Per number of days		
5.	Per number of weeks		
6.	Per number of months		
7.	Per number of years		
8.	Per fixed date		
9.	Per included hours		
10.	Per included earnings		
11.	Per pay period		
12.	Per customer defined rules		
13.	PTO plans can be configured to adhere to user-defined carryover rules.		
14.	Supports unlimited types of leave.		
15.	Tracks the approved date when the employee's leave of absence is expected to start.		
16.	Tracks the approved date when the employee is expected to return from the leave.		
17.	Tracks and reports cumulative (FMLA) time taken.		
18.	Maintains leave of absence history.		
19.	Calculates the planned duration based on expected end and start dates.		
20.	Employees can view PTO/leave plan balances.		
21.	Employees can request PTO/leave.		
22.	Manager can view PTO/leave plan balances.		
23.	Managers can view pending employee PTO/leave requests.		
24.	Manager can request PTO/leave.		
25.	Workflow approval processes are included for PTO/leave requests initiated by employees or managers.		
26.	Ability to have multiple leave rules based on the state in which the employee works.		

Flexible Spending Account (FSA) or HSA

Does your system support multiple FSA accounts/ HSAs?

How does your system notify third party FSA vendors when an employee terminates?

	Requirement	Code	Comments
1.	Supports associate enrollment.		
2.	Enrolls associates in FSA/HSA plans through benefits open enrollment.		

	Requirement	Code	Comments
3.	Maintains two open plan years so reimbursements can be paid from one year, while beginning claims processing for the new benefit year.		
4.	Restricts participants from receiving more than the annual contribution election limit for reimbursement accounts.		
5.	Supports associate enrollment.		

Pension

Provide an overview of pension-related features/functionality of your system.

Describe how the system manages years of service for rehires and breaks in service.

Explain how your system tracks pension payouts to terminated associates.

Describe how years of service are managed in the system.

Does your system provide a way to determine if a rehire has already had a pension pay out and the date of pay out?

Pension and service years can be determined reflecting an associate's leave of absence under FMLA.

Can your system calculate the employer contribution amount by participant?

APERS Pension and 457(b)

Describe how your system exports pension and 457(b) enrollment/change data to a ready-to-send file that can be transmitted to record keeper/trustee on a weekly basis or at initial enrollment.

Describe how you manage changes from third-party vendors.

What types of information have you provided to third-party vendor regarding address changes, terminations, etc.?

Explain how your system will enable us to handle associate loans against 457(b) plans, including repayment through payroll deductions.

How will the system notify us that an associate has an unpaid loan balance at termination?

Explain how your system handles maximum IRS allowable annual contributions. How is this maximum changed as IRS maximums change?

Describe how your system calculates IRS maximum allowable contributions when participant chooses to contribute in both pre-tax and after-tax plans.

Describe how calculations for "employer portions" are established and managed in the system. Pre-tax & after-tax?

How are "catch up" contributions handled in your system?

Describe how 457(b) contributions, sent to our record keeper/trustee, are reconciled.

COBRA

	Requirement	Code	Comments
1.	Defines employee's COBRA status, date of qualifying COBRA event, description of COBRA event, and date the COBRA notification letter was sent.		
2.	Defines dependent's COBRA status, date of qualifying COBRA event, description of COBRA event, and the date the COBRA notification letter was sent.		
3.	Automatically captures COBRA information during the termination process		
4.	Automatically generates COBRA notifications.		
5.	Create COBRA notification letters and invoices.		
6.	Exports all employee and dependent COBRA information to a third-party COBRA administrator.		
7.	Generates COBRA billing documents		
8.	Maintains COBRA payment history		
9.	Manager can request PTO/leave.		
10.	Workflow approval processes are included for PTO/leave requests initiated by employees or managers.		
11.	Ability to have multiple leave rules based on the state in which the employee works.		

POSITION MANAGEMENT:

How are position statuses maintained in the system?

What information associated with the employee is controlled by the position?

What are the system rules for calculating FTE?

Will the system enable us to track positions currently including those budgeted now, in the future, and in the past?

	Requirement	Code	Comments
1.	Provides position management reports by different organizational levels.		
2.	Tracks headcount and full-time equivalents (FTE) associated with positions.		

	Requirement	Code	Comments
3.	Tracks multiple position assignments for an employee.		
4.	Calculates FTEs in multiple ways.		
5.	Stores unlimited history of changes recorded to the position record.		
6.	Tracks unlimited history of changes to employee position assignments.		
7.	Records information for replacement planning, indicating possible new positions for employees.		
8.	Integrates with recruitment and staffing feature for establishing requisitions.		
9.	Supports the generation of organization charts based on position “reports to” hierarchy.		
10.	Tracks status of position approval.		
11.	Allows overstaffing for positions.		
12.	Prohibits assignments to a position if overstaffing is not allowed.		
13.	Allows position codes in the GL distribution.		
14.	Allocates employee pay by position code automatically.		
15.	Assigns position number manually or automatically.		
16.	Provides on-line position incumbent data.		
17.	Provides on-line prior position incumbent data.		
18.	Indicates budget period.		
19.	Maintains approved budget by position including dollars, hours and FTEs.		
20.	Tracks current budget accumulators and provides on-line views.		
21.	Tracks budget variances.		
22.	Maintains multiple budget plan years on-line.		
23.	Standard reports that assess budgeted vs. actual FTE’s and dollar amounts.		

PAYROLL:

Describe your application's payroll functionality.

Is this application integrated with the main HRIS application?

Was this application developed in house or purchased?

Explain how changes are tracked and viewed throughout the system.

Describe the payroll process for transferring an associate between departments, companies, or states. Is this integrated with the HR function or is a separate process required?

Describe tools/features available for employees to submit inquiries on their pay.

	Requirement	Code	Comments
6.	Ensures payroll system reflects appropriate earnings and deduction codes based on company benefits and compensation structures.		
7.	Allows system to be set-up to receive and manage company initiatives such as United Way.		
8.	Provides online help in application for end-users.		
9.	Provides online help in application for administrators.		
10.	Provides "wizards" to walk users through completing tasks.		
11.	Provides a "test" system for customers to test new features and potential changes.		
12.	Provides a "test" system for customers to use for internal training.		

EARNINGS:

Explain how your system will enable us to pay multiple earnings that are taxed differently, but paid on the same pay check (e.g., regular wages taxed based on the W4 and bonus wages taxed at the supplemental rates on one pay check).

Explain how your system will enable us to combine multiple earnings for an individual working multiple positions or jobs.

Are there limits to the number of earning codes that can be established in your system?

Can specific earnings be scheduled for a specific payroll cycle?

	Requirement	Code	Comments
1.	Provides an unlimited number of earnings codes		
2.	Pays various earnings types (e.g., holiday worked, comp time payout) after an employee is terminated on system.		
3.	Provides automatic gross up calculation for earnings.		
4.	Allocates earnings by different organizational levels.		
5.	Delivers all federal, state and local earnings tax categories.		
6.	Calculates and initiates off-cycle/special payments (e.g., certificate pay, holiday payout, poll worker, manuals).		
7.	Delivers an expression builder to create company specific earnings calculations.		
8.	Allows for earnings to be scheduled in the payroll		

	Requirement	Code	Comments
	calendar.		
9.	Specifies start and stop dates for earnings.		
10.	Differentiates which earnings to include/exclude from other calculations (e.g., shift, deferred compensation).		
11.	Earnings codes are specific for different types or groups of employees (e.g., part time or executive).		
12.	Tracks YTD amounts, by earnings type, for unlimited number of years in check detail history.		
13.	Tracks YTD hours worked, by hours type, for unlimited number of years in check detail history.		
14.	Supports the calculation of taxable fringe benefits.		
15.	Supports the calculation of imputed income.		
16.	Provides ability to enter non-taxable reimbursements.		
17.	Handles employees with multiple rates of pay.		
18.	Calculates various shift premiums.		
19.	Accurately pays shift premium for employees who work multiple shifts.		
	Overtime calculations include:		
20.	Half time		
21.	Time and a half		
22.	Double time		
23.	Comp Bank		
24.	Calculates co-efficient overtime on the payroll input screen.		
25.	Distinguishes between regular and premium wages for workers' compensation.		
	Automatically accumulates hours and earnings by:		
26.	Fiscal year-to-date		
27.	Year-to-date		
28.	Quarter-to-date		
29.	Month-to-date		
30.	Last payroll		
31.	Employees can view YTD earnings through employee self -service.		
32.	Define hours per week by employee or job level.		
33.	Is file ID# unique i.e. no instances where a new number needs to be reassigned a new number regardless of entity.		

DEDUCTIONS/BENEFITS:

Describe the integration between benefits and payroll. When a change is made to an employee's benefit election (e.g., single to family coverage), how does the deduction amount get changed in payroll or other outside systems?

How does your product recover deduction amounts that have not been withheld from an employee's pay?

Does your system calculate garnishments based on the state and federal calculation rulings?

	Requirement	Code	Comments
1.	Provides an unlimited number of deduction codes.		
2.	Calculates garnishments based on the state and federal calculation rulings.		
3.	Stores other relevant garnishment data at the deduction level (e.g., case number, payee).		
4.	Delivered logic to properly calculate multiple garnishments.		
5.	Sends child support and/or other payroll deduction information to accounts payable for separate check processing.		
6.	Delivers all federal, state and local deduction/benefit tax categories.		
7.	Accommodates one-time deductions.		
8.	Delivers an expression builder to create company specific deduction calculations.		
9.	Allows for deductions to be scheduled in the payroll calendar.		
10.	Allows client-defined prioritizing of deductions.		
11.	Associates goal limits to deduction codes.		
12.	Supports start and stop dates for deductions.		
13.	Automatically cancels specified employee deductions upon termination based on company business rules.		
14.	Supports effective dating with deductions.		
15.	Includes a rate table at the company level for benefit deduction amounts, so they are not manually entered on each employee.		
16.	Deduction cost can be entered for the new year, while continuing processing for the current year		
17.	Deduction codes are specific for different types or groups of employees (e.g., part time or executive).		
18.	Tracks YTD amounts, by deduction type, for unlimited number of years in check detail history.		
19.	Allocates deductions by multiple organizational levels.		

	Requirement	Code	Comments
20.	Maintains unlimited history of all deduction changes.		
	Automatically accumulates deductions by:		
21.	Fiscal-year-to-date		
22.	Year-to-date		
23.	Quarter-to-date		
24.	Month-to-date		
25.	Last payroll		
26.	Allows employees to view YTD deductions through employee self-service.		
27.	Ability to temporarily override deduction amounts		
28.	Temporarily inactivate deductions at the employee level one-time or on an on-going basis		
29.	Temporarily inactivate deductions at the company level to affect all employees		

CALCULATING PAY

Where is gross pay calculated (i.e., payroll or time and attendance system)?

Describe how a time and attendance system would be integrated into the calculation of pay.

Describe how an out-of-cycle check is calculated and processed. Manual payments allowed?

Describe how time without pay and partial pay are calculated by your system. Include exempt and non-exempt.

Describe how pay is calculated for new hires and terminations.

Describe how adjustments to exempt salaries are calculated, particularly partial pay.

	Requirement	Code	Comments
1.	Supports unlimited earnings, deductions and tax codes.		
2.	Supports different types of income.		
3.	Supports associates with multiple rates of pay and department/cost center assignments.		
4.	Tracks associates with multiple pay rates and departments/cost center assignments.		
5.	Maintains and updates overtime and pay specific rules including state specific rules.		
6.	Supports automatic retroactive pay calculations and payments.		
7.	Enables date-driven salary changes (allowing past and future		

	Requirement	Code	Comments
	changes).		
8.	Allocates by different organizational levels and/or projects.		
9.	Calculates shift differentials and job premiums automatically.		
	Automatic calculations		
10.	Performs gross to net calculations per associate per check and are immediately viewable.		
11.	Calculates and initiates off-cycle and special payments (e.g., signing bonus, annual bonus).		
12.	Provides automatic gross up calculation for earnings.		
13.	Overtime calculations include:		
14.	Half time		
15.	Time and a half		
16.	Double time		
17.	Comp Bank		
18.	Guaranteed overtime (e.g., paid overtime for working Saturday even if normal work week does not exceed 40 hours)		
	Customer can override an associates pay check by entering or changing:		
19.	Tax frequency		
20.	Method of payment (check vs. direct deposit)		
21.	Rate of pay		
22.	Shift codes – How many are allowed?		
23.	Hours		
24.	Earnings		
25.	Deductions		
26.	Deduction arrears		
27.	Taxes (State, Federal, and Local)		
28.	Allocation fields (dept, project, location, etc.)		
	Non-Wage Income		
29.	Handles earned income credit.		
30.	Handles imputed income by pay period.		
31.	Handles moving expenses to reflect as income		
	Wage Allocations		
32.	Supports multi-tier wage allocations across multiple cost centers		
33.	System provides wage allocations by:		
34.	Companies		
35.	Departments		
36.	Divisions		
37.	Regions		
38.	Locations		

	Requirement	Code	Comments
39.	Branches		
40.	Cost centers		
41.	Projects		
42.	Pay groups		
43.	Terminated Associates		
44.	Automatically stops deductions and calculates final pay based on associate's termination date (including PTO, benefit deductions, etc.).		
45.	Identifies associates who have pension dollars required to be paid out at termination.		
	Reporting		
46.	Provides standard wage allocation reports		
	Reports can be created with actual cost allocations including:		
47.	Rate of pay		
48.	Shift codes – How many are allowed?		
49.	Hours		
50.	Earnings		
51.	Deductions		
52.	Deduction arrears		
53.	Taxes (State, Federal, and Local)		

TAXES:

Describe tax resources provided to your customers on tax regulations at the federal, state, and local levels? How do your customers access this information?

Note whether you developed your own tax calculation system or you use another company's tax calculation system. If you use another company's tax calculation system, explain how it integrates with your payroll system.

What tax updates, if any, are provided and how are these updates received?

Describe how your system can accommodate consolidated tax returns for multiple companies.

Do you provide full tax filing processes?

	Requirement	Code	Comments
1.	Provides for all federal, state and local taxing jurisdictions within the United States and its territories.		
2.	Provides for all taxing jurisdictions for international locations.		

	Requirement	Code	Comments
3.	Supports tax calculations of lived in versus worked in state and local payroll taxes.		
4.	Supports state and local reciprocal agreements.		
5.	Provides all relevant end of year payroll processing reports, including W-2, 941, 1099s, State, SUI, and worksite reporting.		
6.	Supports the outsourcing of payroll tax deposits and filings.		
7.	Vendor can provide a print service for W-2s.		
8.	Supports client with preparing tax deposits and filings internally.		
9.	Produces tax documents, magnetic media, and signature ready reports to file.		
10.	Allows a customer to create/print their own W-2s.		
11.	Allows an employee to view/print their own W-2.		
12.	Supports federal, state and local supplemental wage taxation.		
13.	Allows for earnings to be taxed at different tax rates (e.g., regular and supplemental) on the same check.		
14.	Delivers all wage tax categories for wages reported (e.g., W-2, 1099).		
15.	Maintains tax rates within the proposed system.		
16.	Maintains a history of tax tables by change date.		
17.	Employees can change W-4 information via a Web portal.		
18.	Managers can change employee W-4 data via a Web portal.		
19.	Tax documents (e.g., signed W-4, I-9) can be attached to an employee's record.		
20.	Employees can perform pay check modeling.		
21.	Provides a payroll tax reconciliation tool.		
22.	Tracks YTD taxes, by tax, type for an unlimited number of years in check detail history.		
23.	Tracks YTD taxable wages, by tax type, for an unlimited number of years in check detail history.		
24.	Accommodates separate tax-exempt controls for federal, state, and local taxes.		
25.	Provides additional withholding fields for federal, state, and local taxes.		
26.	Supports one-time additional tax amounts in payroll processing.		
27.	Allows for payroll adjustments to correct taxes to be posted to current quarter.		
28.	Allows for payroll adjustments to correct taxes to be posted to a prior quarter.		

	Requirement	Code	Comments
29.	Allows for a payroll administration user to generate an employee W-2C.		

PAYROLL TIME ENTRY:

Explain how employee timesheets can be entered on-line. How are these timesheets approved?

	Requirement	Code	Comments
1.	Allows customization of the pay sheet so that only data for a specific payroll appears on the pay sheet.		
2.	Specifies the columns the user wants to display on the pay sheet.		
3.	Controls the properties of the columns the user specifies.		
4.	Designates specific groups of employees to pay.		
5.	Views employee and group totals as payroll data is entered.		

PAYROLL PROCESSING:

Describe the process, steps, and time required for running payroll.

Describe the payroll gross-to-net process. Include manual checks.

Describe situations that cause down time for other areas of the application when payroll is processing.

Describe the audit process for each payroll.

How are unscheduled payrolls handled?

Describe payroll and year-end processing in the proposed system.

Describe your adjustment process for a typical payroll. How are quarter-end and year-end adjustments processed?

Are all custom payroll reports available to view during payroll processing?   Please explain.

Are there any payroll reports that cannot be accessed while payroll is running? Why?

What is the process if payrolls need to be re-run multiple times?

Is there a limit to how many times payroll can be re-run?

Is data syncing necessary for payroll processing? Why?

Can you reprint checks if printer or something errors?

	Requirement	Code	Comments
1.	Run supplemental payrolls at any time.		
	Provides for pay data entry by:		
2.	Employee online		
3.	Manager online		
4.	Batch uploads		
5.	Import from third party time and attendance solution		
6.	Exception-based/autopay (e.g., salaried or fixed hourly employees).		
7.	Performs gross-to-net calculations per employee per check, which are immediately viewable.		
	User can override an employee's pay check by entering or changing:		
8.	Tax Frequency		
9.	Method of payment (e.g., check vs. direct deposit)		
10.	Rate of pay		
11.	Hours		
12.	Earnings		
13.	Deductions		
14.	Deduction arrears		
15.	Taxes		
16.	Allocation fields (e.g., dept, job, project, location)		
17.	Performs gross up calculations.		
18.	Allows for an unlimited number of checks issued to an employee per payroll processing.		
19.	When preparing multiple checks for an employee during a payroll process, options exists for direct deposit or live check as well as the ability to exclude or process deductions.		
20.	Provides pre-check registers and audit reports prior to processing payroll.		
21.	Allows for manual checks to be printed onsite or any location.		

	Requirement	Code	Comments
22.	Voids payroll checks by selecting the appropriate check; changes should be applied to applicable quarter's totals.		
23.	Provides capability to re-run selected steps of the payroll process.		
24.	Provides for check reconciliation.		
	Using Web browser, administrators can run the entire payroll process including:		
25.	Collect employee time		
26.	Open payroll		
27.	Calculating pay (including gross-to-net)		
28.	Pre-check preview and editing		
29.	Check payroll processing status		
30.	Generating pay checks and/or direct deposit advises		
31.	Payroll reporting		
32.	GL reporting		
33.	Post payroll		
34.	Close payroll		
35.	Create manual checks (interim, voided)		
36.	Print checks from the Web		
37.	Update deduction goal amounts		
38.	Perform check reconciliation		
39.	Tax filing		
40.	Supports different types of payment methods (e.g., direct deposit, live check).		
41.	Print checks in any order, which may differ from payroll registers.		
42.	Proposed vendor can provide check printing services.		
43.	Provides internal check printing capability.		
44.	Supports laser printed pay statements to include MICR coding and signatures.		
45.	Supports unlimited check detail history.		
46.	Provides online pay statements to employees without creating paper statements.		
47.	Allows for paid time off information (e.g., vacation) to be on pay statement.		
48.	Supports paying employees from different bank accounts.		
49.	Create an "ACH" file for direct deposit.		
50.	Can rerun "ACH" file to include adjustments.		
51.	Allows employees to have up to 99 direct deposit accounts.		
52.	Supports partial direct deposits in either a flat dollar amount or a percentage of an employee's pay.		
53.	Supports Positive Pay.		
54.	Process a refund (negative deduction) with no earnings,		

	Requirement	Code	Comments
	pretax and after-tax deductions (taxes adjusted with refund).		

CHECK MANAGEMENT:

Describe how your customers process and print a check locally at their site.

Explain how your system provides direct deposit for associates including direct deposit to multiple accounts. Indicate the maximum number of accounts to which an associate can deposit pay and the methods (fixed amount, percent, or other) by which the funds can be split.

	Requirement	Code	Comments
1.	Supports different types of payment methods (e.g., direct deposit, live check, etc.).		
2.	Supports printing checks in any order, which may differ from payroll registers.		
3.	Supports check printing services by vendor.		
4.	Supports unlimited check detail history.		
5.	Provides online pay statements to associates, without creating paper statements.		
6.	Allows for Paid Time Off and Accrued Absent Time (AAT) information to be on pay statement.		
7.	Supports paying associates from different bank accounts.		
8.	Creates an ACH file for direct deposit.		
9.	Allows customer to rerun ACH file to include adjustments.		
	Voided Checks		
10.	Provides ability to void checks by number and reversals are immediately fed to the general ledger.		
11.	Provides ability to enter multiple check voids by range.		
	Direct Deposits		
12.	Handles direct deposit to multiple financial institutions in various federal reserve districts.		
13.	Allows for an unlimited number of checks issued to an associate per payroll processing.		
14.	Allows for manual checks to be printed onsite.		

LABOR ALLOCATION:

Explain how the proposed system would allocate by different organizational levels and projects.

Describe how the proposed system handles employees with multiple rates of pay and department or cost center assignments. How would employees with multiple jobs or positions be handled?

Describe how your system recognizes over time for employees who work across various divisions or companies within the same work week.

	Requirement	Code	Comments
1.	System provides for an unlimited number of the following:		
2.	Companies in one database		
3.	Departments		
4.	Divisions		
5.	Locations		
6.	Cost centers		
7.	Jobs		
8.	Supervisors		
9.	Pay groups		
10.	GL base accounts		
11.	Tracks an unlimited number of labor distributions in history.		
12.	Allows at least four client definable organizational levels.		
13.	Supports a multi-tier labor allocation (e.g., allocation on different fields, dept, job, location).		
	Reports can be created with actual cost allocations including:		
14.	Earnings		
15.	Employee deductions		
16.	Employee taxes		
17.	Net pay		
18.	Employer deductions		
19.	Employer taxes		
20.	Workers' compensation premiums		
21.	Supports the creation of labor allocation files with user defined timeframes (e.g., 1 payroll period or 7 payroll periods).		
22.	Allows actual labor allocations to be fed into General Ledger.		
23.	Creates labor allocation reports.		
24.	Allows for end of month accrual processing		

GENERAL LEDGER:

Describe your general ledger process.

Identify general ledger and financial systems that interface with your software?

Please describe how the proposed system will support multi-tier labor allocations to post actual employee cost to GL. This includes the allocation of wages, employee and employer taxes, and employee and employer deductions by multiple organizational levels.

What reporting tools are available to query General Ledger transactions generated from payroll?

Can data be exported to excel for editing capabilities?

Is there a limitation to length, character segments of General Ledger number?

Can you use descriptions in the General Ledger?

What setup is required for integration i.e. import and exports?

	Requirement	Code	Comments
1.	Maps GL account numbers within your payroll system.		
2.	Accommodates multiple GL segments and can be printed separately or all together on reports.		
3.	GL setup tables are assessable by users to change at any time.		
4.	GL distribution report or file can be created for a user defined period.		
5.	An exception to the GL mapping is accommodated down to the employee level.		
6.	Creates GL accruals.		
7.	GL account numbers can be changed by the user and the GL can be rerun for specified pay period(s)		
8.	Immediate availability of GL data when the payroll is posted to history.		
9.	GL historical data is accessible to user.		
10.	Adjustments (e.g., manual and void checks) are automatically posted to GL.		
11.	GL feature includes tools to export data in a user specified format.		
12.	Provides an ad hoc query tool for reporting on GL data.		
13.	Provides an OLAP tool for reporting on GL data		

TIME AND ATTENDANCE:

Please describe your Time and Attendance functionality.

Does your system include a leave management feature?

	Requirement	Code	Comments
1.	Includes multiple rounding rules by pay group.		
2.	Multiple grace periods by pay group.		
3.	Unlimited number of user defined time/earnings codes		
4.	Includes the definition and application of complex pay rules based on timesheet details.		
5.	Date effective recording of all timesheet- and employee-related data.		
6.	Can maintain and modify any and all complex pay rules without vendor intervention.		
7.	Allow employee punch captured for start and stop times of breaks and lunches.		
8.	Allow group change capabilities to modify common elements in a group of employee timesheets.		
9.	Employees can enter hours using on-line timesheets.		
10.	Timesheet values can be adjusted by week and selected days within a week by authorized users.		
11.	Provides a comprehensive audit trail of all changes made to the timekeeping records.		
12.	Tracks both standard and actual hours by activity code for analysis purposes.		
13.	Stores employee (contractor) hours to be withheld from payroll upload.		
14.	Retro calculations based on payroll transfer date.		
15.	Allow the viewing of overtime by employee(s) by time period.		
16.	Allow validation of over 100,000 docket codes, in an on-line fashion, when activity code is entered at timekeeping device.		
17.	Includes various types of payroll lockdown dates to freeze timesheet edits for payroll processing (i.e. supervisor lockout date, hands-off date, etc.).		
18.	Allow a fully reconciled payroll, labor and job activity information captured and maintained within the application		
19.	Allow the tracking of labor metrics (includes project, job, department and dockets).		

	Requirement	Code	Comments
20.	Allow the real-time alerting of immediate time and attendance value/ rule violations including; Minor rule violation State rule violation Local rule violation No shows Approaching Overtime		
21.	Allow employees to punch in and out and make position changes on-line.		
22.	Allow on-line edits to daily timesheets by employee and by authorized users.		
23.	Allow real time access to activities and related costing information.		
24.	Allow the validation of absence codes against associated leave balances.		
25.	Allow for absence tracking with year at a glance scoring and analysis.		
26.	Allow for the viewing employee attendance data for a given year.		
27.	Allow employees to request time off, tracks status with dynamic validation against time off business rules.		
28.	Allow for the employee to view their timesheet along with weekly hours and costs.		
29.	Allow for non-technical personnel to generate standard reports via a web-based, wizard-style interface.		
30.	Allow for scheduled reports to run automatically and be distributed to specific users/distribution lists, via email or other means of distribution.		
31.	Allow for the building, modification and maintenance of custom reports by non-technical employees.		
32.	Allow for the report hours of worked/dollars earned by employee by selected date range.		
33.	Allow the reporting employee leave balances totals.		
34.	Allow for reports to be created by copying an existing report and modifying it.		
35.	Allow for the routing of exception report results to supervisors.		
36.	Allow for business intelligence rules to be built supporting customer specific requests.		
37.	Tracks FMLA including intermittent leave.		
38.	Report on FMLA status include intermittent leave based on rules established.		

HISTORY:

Explain the kinds of historical information your system maintains.

What accumulators are standard? Please give examples.

For archived records, what is the retrieval time?

How is system performance affected by the growth of the historical records?

	Requirement	Code	Comments
1.	Provides a narrative history (e.g., for disciplinary actions, grievances, exit interviews).		
2.	Provides point-in-time reporting capability.		
3.	All historical data is viewable.		
4.	All historical data is reportable.		
	Maintain unlimited history on the following:		
5.	Job information		
6.	Salary and wage data		
7.	Evaluation and performance data		
8.	Career, skills and education		
9.	Training information		
10.	OSHA and workers' compensation data		
11.	Organizational changes		
12.	Employee status		
13.	Benefit elections		
14.	Pay check details		
15.	Earnings detail		
16.	Deduction detail		
17.	Tax detail		
18.	Archives older historical records.		
19.	Can bring firm history from prior software.		

CONVERSION

Describe how existing history is extracted and imported to your system at conversion.

Are there fees associated with converting history?

POST CONVERSION

Define the historical information your system maintains and how long it is available to your customers.

EMPLOYEE SELF SERVICE:

Describe your application's employee self-service functionality. What are the major features?

Is this application integrated with the main HRIS application?

When was this product developed?

Was this application developed in house or purchased?

Please explain how your employee self-service feature will assist in the communication between the company and employees. What types of information can be made available to our employees, reducing the amount of calls to human resources and payroll?

Can pictures be embedded in an employee record? What are the file types?

	Requirement	Code	Comments
1.	Employees can view communications posted from administrators.		
	Employees can access links that can launch:		
2.	Documents (forms may be saved and/or printed).		
3.	Web sites		
4.	E-mails		
5.	Employees can model their paycheck for changes including deductions, marital status, and exemptions.		
	Employees can view and/or update personal information including:		
6.	Name		
7.	Address		
8.	Phone numbers		
9.	Emergency contacts		
10.	Previous employment		
11.	Educational background		
12.	Employees can view their status and key dates.		
13.	Employees can view company property assigned to them.		
14.	Employees can view EEO/I9 information.		
	Employees can view job information including:		
15.	Job code and title		
16.	Date and time in job		
17.	Compensation		
18.	Supervisor.		
19.	Organizational levels		
20.	Unlimited job history including change reasons		
21.	Unlimited performance review history		
22.	Unlimited salary review history		
23.	Licenses		

	Requirement	Code	Comments
24.	Skills		
25.	Tests		
26.	Awards		
	Employees can view unlimited pay history including:		
27.	Net pay		
28.	Hours by code		
29.	Earnings by code		
30.	Deductions by code		
31.	Taxes by code		
32.	Direct deposit distribution		
33.	Employees can view current and previous year-to-date totals.		
34.	Employees can view and update their direct deposit distribution and set effective date.		
35.	Employees can download and print their W-2.		
36.	Employees can designate that the electronic copy of the W-2 is the only copy that they require.		
37.	Employees can enter time transactions.		
	Employees can view benefit information including:		
38.	Current benefit elections		
39.	Employer contributions by code		
40.	Beneficiaries and dependents		
41.	PTO accruals and balances		
42.	Cobra qualifying events		
43.	Participate in an electronic open enrollment		
44.	View all eligible plans		
45.	View the costs associated with these plans		
46.	Choose their benefit plan and coverage option		
47.	Request time off from their manager		
	Employees can update current benefits coverage based on the following life events:		
48.	New hire		
49.	Adding a dependent		
50.	Removing a dependent		
51.	Change in marital status		
52.	Change in address/location		
53.	Employees can view documents attached to their employee record.		
54.	Employees can view open jobs.		
55.	Employees can apply for open jobs.		

MANAGER SELF-SERVICE

Provide an overview of the features available through the manager self-serve.

Describe how managers are limited to information for only their direct reports (or within their organizations).

Describe the integration between your manager self-service application and your HRIS/payroll software.

Describe to what level access to information can be controlled (e.g., screen, field, etc.).

Does the application provide managers access to the entire employee self-service functionality? Please explain.

What employee data is a manager NOT able to access and does client control?

Are managers able to run reports from self-service? How is this performed?

Describe how managers can create and save their own reports.

	Requirement	Code	Comments
1.	Managers have access to the entire employee self-service capability.		
2.	From a Web browser, managers can search for employees by name or employee number.		
	From a Web browser, managers can view and/or modify the following information:		
3.	Employee personal information		
4.	Employee job information		
5.	Employee job history		
6.	Employee compensation history		
7.	Previous employment information		
8.	Educational background		
9.	Licenses and certifications		
10.	Salary reviews		
11.	Performance reviews		
12.	Begin requisition process to create job openings		
13.	Review and approve vacation request		
14.	Review and approve leave request		
15.	Update organization information (e.g., department, division, supervisor).		
16.	Assign employee paid through dates		
17.	Attach documents to an employee record		

	Requirement	Code	Comments
18.	Establish whether attached documents are viewable by the employee		
19.	Begin termination workflow process.		
20.	Access on-line forms/checklist, etc.		

SYSTEM ADMINISTRATION:

Explain the delivered capabilities for a system administrator to manage self-service?

Can you have multiple system administrators?

What limitations would a system administrator have in managing self-service in a hosted environment?

	Requirement	Code	Comments
1.	Offers role-based security (system access based on an individual's role within the organization).		
2.	Offers control over which values a user may select from when changing employee data (e.g., user is allowed to assign a certain number of job or department codes).		
3.	Offers the ability to copy roles when creating them.		
4.	Includes built-in workflow.		
5.	Includes a Web business rules feature that enables administrators to view and edit entries in code and description tables.		
6.	Includes a company communication posting feature that enables you to make company information available 24 x 7 to users via the Web.		
7.	Includes the ability to upload and securely share documents such as Microsoft Word documents, Excel spreadsheets, and PDF files.		
8.	Offers a page linking tool that allows users to create hyperlinks from your portal to external Web sites, other products or other Web pages (e.g., link to your benefits network).		
9.	Includes the ability to designate whether page links will appear inside the product framework or be launched in a second browser.		
10.	Includes the ability to customize the color scheme for your Web pages.		
11.	Includes the ability to re-brand the Web pages (i.e., use your own logo).		

	Requirement	Code	Comments
12.	Includes the ability to add your own menu items and Web pages, and still be contained within the system's security framework.		
13.	Includes the ability to establish user-defined fields on Web pages.		
14.	Offers the choice to display or not display user-defined fields on employee Web pages.		
15.	Designates different levels of ability to manage system administration activities, from a super user with all rights, to users with lesser degrees of system administration access.		
16.	Generates data-driven user names and passwords to increase the options for creating Web user login names and default passwords.		
17.	Allows you to view user login activity.		
18.	Adds non-employee users (e.g., IT support, auditors) as system users.		
19.	Activates new Web users automatically or manually.		
20.	Terminates employees' Web access inactivated automatically or manually.		
21.	Resets user passwords.		
22.	Requires strong passwords (case sensitive).		
23.	Requires that passwords expire based upon a number of days designated by the system administrator.		
24.	Requires that passwords for a given user are always different by maintaining password history.		
25.	Stores and displays password hints to help remind users of their passwords.		
26.	Uses a mass password reset to change the default password for one or all users.		
27.	Ability to secure at a field level.		
28.	Ability to audit who has viewed/changed items in the system.		
29.	Can the system establish single log on for all components of system?		

WORKFLOW:

Describe the workflow capabilities delivered with employee self-service.

Is the workflow part of the employee self-service application, or is it delivered through a third party?

Please describe the workflow setup including where custom programming is required. Do you supply any predefined workflow processes? If so, how many are delivered as standard? How much flexibility does client have in building workflows?

Can you have multiple levels of approvals for your workflow?

Ability to configure notifications upon hire/term via both email and APIs to enable automated business workflow orchestrations.

What tools are available to enable workflow in your system?

Is there any limit to the number of approvals an action can go through? Can there be different workflow/approval paths based on reason or if/then else logic of a change (e.g. over threshold, level of person requesting the change)?

	Requirement	Code	Comments
1.	Provides built-in approvals for a hierarchy (multiple levels) of approvers.		
2.	Provides for approval by role, where anyone who is assigned the role can approve incoming requests.		
3.	Allows the re-allocation or delegation of tasks from one approver to another.		
4.	Allows the assignment of observers and e-mail recipients to workflow processes.		
5.	Automatically send e-mail notices to approvers to inform them that they have a request that requires attention.		
6.	Automatically sends e-mail notices to the initiator of a request to let him/her know it has been approved.		
7.	Allows users to view outstanding workflow transactions in various states such as pending or complete		
8.	Allow out of the office delegations to automatically manage workflows during an individual's absence		
9.	Allow users to cancel pending workflows (e.g., when an employee leaves the company).		
10.	Provides wizards to walk managers through work event processes.		

	Requirement	Code	Comments
11.	Uses audit trails to capture all modifications to employee information.		
12.	Captures the date and time when a request was approved.		
13.	Captures who approved a request.		
14.	Captures approver comments associated with a request.		
15.	Performs real-time updates to employee information.		
16.	Allows users to make date-sensitive changes, which are applied on the desired date.		
17.	Allows users to view summary statistics about all workflow activity.		
18.	Allows workflow e-mail messages to be customized.		
19.	Displays warning and error messages to users in relation to requested changes.		

REPORTING:

Provide a brief overview of your reporting tools and how they are integrated with your HR and payroll system.

Does your system have point-in-time reporting capabilities?

Describe your ability to create workforce alerts (e.g., email reminders, reports, etc.).

Describe the ad-hoc report writer that is delivered with your software.

Is this part of the software or a 3rd party addition?

Describe the difference between Web and client reporting functionality.

Describe your point-in-time reporting capabilities.

Describe your ability to create workforce alerts (e.g. e-mail reminders, reports).

Describe any limitations creating online web reports? (e.g. formatting, fields, tables)

Do hosted clients and non-hosted clients have the same ad-hoc and web reporting capabilities?

Can the system support links to other websites?

Discuss how a non-technical user can obtain reports from the system without assistance.

	Requirement	Code	Comments
1.	Provides standard report capabilities.		
2.	Provides ability to schedule standard reports.		
3.	Provides access to unlimited years of check and schedule history.		
4.	Provides flexibility for defining selection criteria, data ranges, sorting and grouping options, and report output enabling users to tailor information to their specific needs.		
5.	Provides ability to set up and run batch reports.		
6.	Provides ability to access reports area from within the system.		
7.	Provides user-friendly, graphical user interface for accessing and running reports.		
8.	Provides point-in-time reporting capabilities.		
9.	Provides integrated ad hoc report writer.		
10.	Generates reports on all fields that exist in the data dictionary.		
11.	Allows for incorporation of graphics such as logos.		
12.	Provides easy-to-use report catalog; user is not required to understand the database design.		
13.	Presents data in a way that makes it easy for users to navigate within a database and assemble reports.		
14.	Provides ability to change field names.		
15.	Provides "open" system so that it can be used with other report writer tools.		
16.	Provides managers with standard pre-formatted reporting functionality.		
17.	Managers can run reports on live data		
18.	Managers can select report criteria at run time		
19.	Access to reports is based on a manager's role (filtered security setup).		
20.	Data on reports is filtered by the manager's security (filtered security setup).		
21.	Report results can be stored		
22.	Managers can view and reuse a previously stored report		
23.	Managers can select a report sort order		
24.	Manager can select a report group order		
25.	Manager can select report page breaks		
26.	Managers can set expiration dates for reports		
27.	Managers can output reports in PDF format		
28.	Managers can output reports in Excel format		
29.	Ad hoc Reporting from a Web browser		
30.	Ad hoc reports can be scheduled		

	Requirement	Code	Comments
31.	Reports be run while managers are in other parts of the system		
32.	Managers can store and access previously run reports		
33.	Managers can create custom reports		
34.	Reports can be assigned an expiration date for automatic purging		
35.	Does the system have the ability to export reports in a format that may be sent to recipients electronically without manual reformatting?		
36.	Can letters be generated as well as mailing labels in multiple formats directly from the system?		
37.	Can the system perform calculations within reports such as Turnover and Retention rates for a specific time interval?		

DATABASE:

What databases does your application support?

Describe the enterprise's responsibility in maintaining and managing the database(s).

Does your system allow backups with no downtime? Does it allow for backups to be unattended? When are backups completed i.e. time of day?

Describe the ease and flexibility for extrapolating data, and maintaining and creating sub-files and macro-processes.

Do you provide your clients with a data dictionary?

How does your application handle multi-user contention or concurrency?
What is the backup schedule?

SECURITY:

Describe the proposed system's Application level security.

Does your application use a secure connection if hosted? If so, please explain the security model used.

Does the proposed application support single sign on?

Is your security roles based or user based?

How are the users and security roles administered?

What is the application authentication process? What methods are used to authorize users?

Can users have more than one security profile?

Does your application allow for customer defined ID and password methodologies?

Does your application allow for global security policies (e.g., number of invalid attempts before reset, time outs)?

How is validation for forgotten passwords processed when an employee locks out or has forgotten log-on information?

Does the application use Active Directory for user authentication?

How does the application authenticate against the database?

How does the system secure uploaded files to prevent access without the application?

CUSTOMIZATION:

Describe the delivered tools and methods required to customize your application. Can we perform these customizations or do you the vendor need to modify the system?

Describe customer configuration vs. vendor customization for product.

Can we customize the look and feel (e.g., logos and colors) in your application?

How are customizations preserved during product updates?

What is the effect of future upgrades on our customizations?

Explain the ability to configure data entry screens and to create new inquiry screens.

IMPLEMENTATION:

What is your process for effectively managing the implementation process?

What is the ratio of implementation and training to software license fee?

How long is a typical product implementation?

Describe the typical implementation project team. Who is the primary point of contact during implementation?

Describe your approach to identifying, managing, mitigating, and tracking of project risks. Provide a sample risk mitigation plan.

Describe your issues management approach and plan. Provide a sample issues management plan and log.

During the implementation process, do your consultants assist with process improvement and/or best practices? Provide examples.

How many employees from client are needed to support the project?

What is your process for moving from implementation to customer maintenance?

How long does implementation team stay with client before transferring to customer service?

KNOWLEDGE MANAGEMENT:

Provide an overview of your training programs and delivery methods.

Is there a test database utilizing real data available for future new employee training?

Where are your training facilities located?

Is there a cost associated with training for customers during or after implementation?

What ongoing customer training is available?

What training materials do you provide?

CUSTOMER SERVICE/SUPPORT:

Provide an overview of your customer support and maintenance services.

What is the cost of your annual maintenance plan?

Do you use your Web site as a mechanism to provide support to your clients? How is the Internet part of your support strategy? Please explain.

What is the experience level of your service and support staff? What is the average length of service in your support area?

How does your firm educate and train your service and support staff?

What technologies do you take advantage of to run your support organization?

What hours does your company provide service and support?

How many support centers do you have and where are they located?

Is there weekend or after hour support?

Is there an after-hours emergency contact number if needed? Is there a charge for this service?

How often do you release new versions of your software?

Do you have any user groups (regional or national)?

Do we get change information prior to release?

What is the test process for new versions?

How do you determine and prioritize changes in your system?

What is the migration process in upgrading to new versions?

BID SHEET

Description	Total	Other Fees (i.e. Licenses, Maintenance, etc.)
Basic Package (what is included in this)		
List below additional modules not in the basic package		
Please list any costs not included in above totals		

The undersigned hereby offers to furnish and deliver the articles or services as specified, at the prices and terms stated herein, and in strict accordance with the specifications and general conditions of bidding, all of which are made a part of the offer. This offer is not subject to withdrawal unless upon mutual written agreement by the Bidder and County Judge.

1. I, as an officer of this organization, or per the attached letter of authorization, am duly authorized to certify the information provided herein are accurate and true; and
2. My organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment.

Date: ____________________ Signature: ______________________________________

Name: ______________________________________

Company: ______________________________________

Address: ______________________________________

____

City, State, Zip: ______________________________________

Phone: ______________________________________

Email: ______________________________________

*Please submit (1) original bid and (1) one copy (CD or USB flash drive).