REQUEST FOR PROPOSAL

Human Resources Information & Payroll System

HRIS/PAYROLL RFP#0123

ISSUED: 01/27/2023
Responses Due: 02/24/2023

LIFEPATH SYSTEMS
1515 HERITAGE DR.
MCKINNEY, TX 75069
972-562-0190

For RFP Questions:
Willy Villavicencio
Purchasing Manager
wvillavicencio@lifepathsystems.org

REQUEST FOR PROPOSAL (RFP) HRIS/PAYROLL RFP#0123

Human Resources & Payroll System

Background Information

Collin County Mental Health Mental Retardation Center d/b/a LifePath Systems (the "Center") was founded in 1986. It is the Local Behavioral Health Authority (LBHA) and the Local Intellectual and Developmental Disabilities Authority (LIDDA) for Collin County, Texas as authorized by the Texas Health and Human Services Commission (HHSC). In addition to its role as Authority, the Center is a provider of behavioral health services and a provider of services for individuals with intellectual or developmental disabilities.

Throughout this RFP, reference to "Center" is assumed to define and include LifePath Systems. Reference to the "vendor" is assumed to include the vendor and any other vendors and/or personnel with which the vendor has elected to partner for purposes of this RFP.

The Center currently has a dedicated HR and Payroll system.

The Center is seeking proposals for an all-encompassing solution for Human Resources Information and Payroll system. The Center is requesting a system that processes and maintains payroll and personnel for all Center employees including Federal reporting requirements for human resources, accounting, taxes, and benefits. The Center is also requesting a system that can coordinate employee position, compensation, and evaluation/performance management, as well as benefits with open enrollment, self-service, and talent recruiting.

> The proposed system must integrate with the current versions of Blackbaud Financial Edge NXT, Employee Navigator, BCBS Portal for Employers, MetLink, MedCom and OneAmerica.

Scope of Services

The Center is seeking a vendor to provide a single solution for Human Resources Information & Payroll system as outlined in section B System Availability. The Center shall work with the awarded vendor's implementation services team for configuration of items listed in **"EXHIBIT-A- LPS HRIS/PAYROLL Requirements-Vendor-Response",** which must be submitted with all proposals.

A. LifePath Systems Payroll Facts
   - The Center currently has a total of 500+ employees that are paid bi-weekly.
   - Health, Dental, Long-term Disability, Life Insurance, voluntary employee deductions such as supplemental life insurance, Flexible Spending Accounts (FSA), Health Savings Accounts (HSA), etc.
   - System should have system specific monthly and annual reporting requirements.

B. System Availability

The Center will consider both, on premise storage of data" and/or "Cloud based". Cloud based option should be accessible via web and mobile application and supported 24/7 from the Center's network and remote locations.

- HR
    - Organizational Structure and Charts
    - Recruiting/Applicant Management
    - Hiring
    - Termination
    - Onboarding
    - Performance Evaluation
    - Succession Management
    - Employee Relations
    - Employee Development
    - Position Management
- Payroll
    - Payroll time entry and processing
    - Paid Time Off, Vacation, Sick
    - Benefits
    - Life Events
    - Leave Administration
    - Earnings and deductions
    - Check Management
    - Labor Allocation
    - Time and Attendance Management
- System Interface
    - Employee, User and System Administrator interfaces
    - Accessibility to interface via web and mobile application.

C. System Requirements

- Single source, full integrated database
- Customizable, single report writer for all aspects of the system
- Ability to import/export reports using Microsoft Excel
- Option for 100% paperless processing
- Dedicated project implementation team that will support all needs of the Center.
- Ability to migrate historical information from existing HRIS/Payroll system into new system.
- Ability to have production, testing &development server environments (quantity (3) environments) with data refresh capabilities (on demand or request-based)
- For Full list of requirements, see **"EXHIBIT-A-LPS HRIS/PAYROLL Requirements-Vendor-Response."**

D. Maintenance Agreement/System Upgrades

- Proposals must specify the process involved in system upgrades as well as frequency of major release updates, service packs, legislative updates, product life cycle, and end-of-life production.
- Cost of system software version upgrades must be included in the master agreement.
- Training must be provided during initial project implementation phase.
- Training materials and release notes must be provided for updates/upgrades.
- Configuration customization must be available. Potential costs must be outlined. This may include, but not limited to, custom reports, custom input fields, interfaces, etc.

E. Sales, Service and Technical Support

Sales and service support must allow unlimited and immediate access to 24/7 support. A phone number, web portal address and email address for all support needs should be provided by the vendor. A sales and support manager contract should be provided.

Term

The Center anticipates a 3-year contract for services with option of extension for up to five years. As you evaluate your approach to provide services, you are encouraged to recommend contract options and address the relative advantages and disadvantages of your recommendations. Contract duration must allow early termination without penalties to LifePath Systems in the event the Texas Health and Human Services Commission terminates revenue contracts to the Center. The contract can also be terminated for cause.

Fee

The following is a guide for splitting the fee into sections that clearly identify the acquisition/start-up costs versus ongoing solution fees. Although it is not intended to be absolute, significant deviations should be closely reviewed.

A. Fee Matrix

Having examined specifications and requirements of this RFP (including any attachments and published answers to questions), the undersigned proposes to furnish Work upon the pricing terms quoted below:

Deliverable Description	**Costs**	**Comments**
Software License or Subscription		
Software Maintenance/Support (specify pricing/coverage levels offered)		
Implementation Services		
Training & Materials		
Third Party Software		
Third Party Software Support		
Total Year 1 Price		

B. Maintenance Fees

Responses must clearly articulate the anticipated LifePath Systems internal resources necessary for a successful project. Responses must distinguish between implementation and ongoing support after implementation.

Description	Estimated Costs	Comments
Year 1 – Maintenance & Subscription Fees		
Year 2 – Maintenance & Subscription Fees		
Year 3 – Maintenance & Subscription Fees		

Submittal Schedule

Task	Date
RFP Issued	01/27/2023
Questions are due	02/02/2023
Questions answered via addenda	02/08/2023
RFP Submittal Deadline	02/24/2023
Proposal Review	02/27/2023 – 03/10/2023
Tentative Presentation/Demonstration by selected vendors (3 finalists)	03/15/-17/2023
Final Vendor Discussions	03/20-22/2023
Evaluation Team FINAL RECOMMENDATION to Board of Trustees	03/23/2023
Board of Trustees Approval	03/23/2023
Contract Signed	03/31/2023
Project Start (*available project team members*)	04/03/2023

Proposal Deadline

Request for proposal packets may be obtained on the Center's website, www.lifepathsystem.org/contractingopportinities. Responses to the Request for Proposal (RFP) must be received by the Center by 10:00 am CDT 02/24/2023. If you are submitting an electric copy via email, your attachment must include the RFP number, your company name and the date it was sent. If you mail your proposal, it must be postmarked prior to the submission deadline. Mail to:

LifePath Systems
ATTN: Willy Villavicencio
1515 Heritage Dr.
McKinney, TX 75069

Proposal Instructions and Format

Along with a copy of your standard contract, which will be subject to review, negotiation, and possible revision, please include the following items in any Proposal submitted in response to this RFP:

1. Company name, address, phone, and email address.
2. Describe your company's background, ownership of your company and list its principal shareholders.
3. Describe your company and how it is organized including its overall size in numbers of employees.
4. Describe the practicing ideas or themes that serve as the central organizing elements of your company's practice as related to the compliance management software.
5. Provide names and titles of key personnel who would be directly responsible for the work.
6. Please submit key reference contact information including telephone numbers, fax numbers and email addresses.
7. Submit an organizational chart for the entire recommended Team for this project as referenced in item 3 above.
8. Describe the process by which you will develop implementation and deployment services for a typical project.
9. Describe your approach to maintenance services that will assure the functional, technical and requirements are satisfactorily addressed.
10. Explain the management tools, techniques, and procedures your team uses to maintain the project schedule between implementation and go live date.
11. Explain your team's procedures for documenting quality control and coordination of the various disciplines of work amongst your company.
12. Describe the company's support services and the advantages to each tier and /or level, if any.
13. Explain, in detail the services provided by your company regarding software education and ongoing training. What methods does your company use.
14. Explain the hosting services, if any, available from your company.
15. Explain why you believe your team is the most qualified firm to provide the requested services for this Project.

Proposals are expected to provide complete and detailed descriptions of the vendors' abilities to meet the requirements of this RFP and must be submitted in either MS Word or PDF format.

Questions regarding this RFP must be sent by email prior to close of business (5:00 pm CDT) on 02/02/2023 to: Willy Villavicencio wvillavicencio@lifepathsystems.org. Answers to all submitted questions will be posted on the LifePath Systems web site: https://www.lifepathsystems.org/connectwithus/contracting

Proposals which do not meet the criteria below will not be evaluated by LifePath Systems.

The proposal must include a cover letter that provides:

a. RFP Title;
b. Confirmation that proposed fees are firm and guaranteed for 90 days from the proposal due date.
c. A STATEMENT CONFIRMING THAT YOU HAVE READ, UNDERSTAND, AND AGREE TO THE GENERAL AFFIRMATIONS LOCATED AT: https://www.lifepathsystems.org/wp-content/uploads/2021/05/General-Affirmations.pdf
d. Signed by a representative authorized to commit to the terms of the proposal.

The selected vendor will be required to adhere to all Texas contract and confidentiality requirements.

Your response may also contain any narrative, charts, tables, diagrams, or other materials in addition to those called herein; to the extent such additions are useful for clarity or completeness of the response. Attachments should clearly indicate on each page the paragraph in the RFP to which they pertain. The Center will not be liable for any errors in your proposals.

No modifications to your proposal will be accepted except during negotiations initiated by the Center.

The request for proposals and potential inclusion into the demonstration process shall in no way be deemed to create a binding contract or agreement between the respondent and the Center. Upon recommendation of the vendor, the Center will enter into an agreement. If the Center and successful respondent are unable to reach agreement upon a contract, the Center reserves the right to immediately enter into negotiation and agreement with another respondent.

Any verbal communication will be considered unofficial and non-binding regarding this RFP and subsequent award.

Each respondent submitting a Proposal in response to this RFP acknowledges and agrees that the preparation of all materials for submittal to the Center and all presentation, related costs, and travel expenses are the respondents' sole expense as the Center shall not, under any circumstances, be responsible for any cost or expense by the respondent.

The Center shall be allowed to keep all materials submitted by the respondents in regard to this RFP. Each respondent agrees to hold the Center harmless against any expenses, damages, and claims arising from or connected with your proposal, including patent, trademarks, copyright, or other intellectual property infringement or misappropriation.

Any media request of the respondents shall be concurrently directed to the Center during the receipt, analysis, selection, and subsequent contract negotiation until said contract is signed and delivered by the Center.

The Center reserves the right to accept or reject any or all proposals, to alter the selection process in anyway, to postpone the selection process for either party's own convenience at any time, and to waive any defects in proposals submitted. The Center reserves the right to issue addenda to this RFP at any time due to the need for clarification, change in schedule, or other reasons the parties so decide. The Center reserves the right to accept or reject any individual sub-consultants that the successful respondent proposes to use.

Your proposal constitutes an offer that remains open and irrevocable for a period of no less than 90 days unless your proposal states otherwise. Proposals after the award are public documents.

Selection Criteria

The selection and approval of the Proposer will be made in accordance with the Center's competitive bidding and selection process. An evaluation committee will evaluate proposals based on the guidelines set forth in this RFP and will present its findings to the Center's Management. LifePath Systems reserves the right to request additional information and clarification of any information submitted, including any omission from the original proposal. All proposals will be treated equally regarding this item.

LifePath Systems intends to solicit, evaluate, and negotiate proposed terms from qualified Proposers to determine which proposal will serve the best interests of the organization by providing the best value1. Once it is determined that a proposal meets the requirements, the LifePath Systems evaluation team will score each proposal. In determining best value for the organization, LifePath Systems will consider:

1. The purchase price.
2. The reputation of the proposer and of the proposer's goods or services.
3. The quality of the proposer's goods or services.
4. The extent to which the goods or services meet the Center's needs.
5. The proposers past relationship with the Center.
6. The impact on the ability of the Center to comply with laws and rules relating to contracting with historically underutilized businesses and nonprofit organizations employing persons with disabilities.
7. The total long-term cost to the Center to acquire the bidder's goods or services; and any relevant criteria specifically listed in the request for proposals.

The Center will review and create a short list of the number of vendors to provide a demonstration their system. Those vendors that are invited to demonstrate will be expected to have the key project personnel available for demonstration between 03/15-17/2023. Times for individual demonstrations will be announced later but respondents will tentatively be provided a block of 90 minutes for presentation and questions. Representatives for the Center will be in attendance for the demonstrations. Demonstrations will be conducted virtually, unless otherwise stated by the Center.

[1] Texas Local Government Code §252.043(a)(b) Award of Contract

Assurances, Certifications, Exhibits and Attachments

Vendor must submit the Assurance and Certifications and all Attachments requested, to include:

Vendor will submit a copy of their standard contract, along with proposal and **“EXHIBIT-A- LPS HRIS/PAYROLL Requirements-Vendor-Response”.** Label this **(Attachment A)**
Signature Page **(Attachment B)**
Resident/Non-Resident Certification **(Attachment C)**
Assurances Document **(Attachment D)**
Conflict of Interest Questionnaire **(Attachment E)**
Vendor shall review **Texas Administrative Code §412.54(c) and** provide a written response signed by Authorized Individual **(Attachment F)**
Vendor shall review **Texas Health and Safety Code §250.006** and provide a written response signed by Authorized Individual **(Attachment G)**
Form W-9 **(Attachment H)**
Lobbying Certification **(Attachment I)**
Deviation Form **(Attachment J)**

Questions or Inquires

All questions must be submitted electronically no later than 5:00 pm CDT on 02/02/2023.

LifePath Systems
Willy Villavicencio, Purchasing Manager
Email: wvillavicencio@lifepathsystems.org

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LIFEPATH SYSTEMS

ATTACHEMENT B
SIGNATURE PAGE

The attached proposal application is being submitted in response to the HUMAN RESOURCES & PAYROLL SYSTEM (HRIS/PAYROLL) RFP #0123. The proposal is a firm offer and shall remain an open offer, valid ninety (90) days from the date of this document.

LifePath in its sole and absolute discretion shall have the right to award contracts for any or all materials listed in each proposal, shall have the right to reject all proposals and shall not be bound to accept the lowest proposal and shall be allowed to accept the total proposal of any one vendor. I understand that this proposal will be reviewed and evaluated according to the procedures indicated in this RFP.

Authorized Signature	Company Name
Typed or Printed Name	Street Address
Title	City, State, Zip Code
Telephone Number	Fax Number
Email	

ATTACHMENT C
RESIDENT/NON- RESIDENT CERTIFICATION

Contractor must answer the following questions in accordance with the **Texas Government Code §2252.002**, as amended:

A. Is the Contractor that is making and submitting this bid a "resident Contractor" or a "non-resident Contractor"?

Answer:_________Resident Contractor _______________Non-resident Contractor

(1) Texas Resident Contractor - A Contractor whose principal place of business is in Texas and includes a Contractor whose ultimate parent company or majority owner has its principal place of business in Texas.

B. If the Contractor is a "Non-resident Contractor", does the state in which the Nonresident Contractor's principal place of business is located have a law requiring a Nonresident Contractor of that state to bid a certain amount or percentage under the bid of a Resident Contractor of that state for the nonresident Contractor of that state to be awarded a contract on his bid in such state?

Answer:_______Yes_______No Which state? ______________________________

C. If the answer to Question B is "yes", then what amount or percentage must a Texas Resident Contractor bid under the bid price of a Resident Contractor of that state to be awarded a contract on such bid in said state?

Answer: ____

ATTACHEMENT D
ASSURANCES DOCUMENT

The vendor assures the following:

1. All addenda and attachments to the RFP as distributed by the Local Authority and designated by the checklist have been received.
2. No attempt has been or will be made by the vendor to induce any person or vendor to submit or not to submit a Proposal, unless so described in its Proposal.
3. The vendor does not discriminate in its services or employment practices based on race, color, genetic information, religion, sex, national origin, disability, veteran status, or age.
4. All cost and pricing information is reflected in the RFP response documents or attachments.
5. The vendor accepts the terms, conditions, criteria, and requirements set forth in the RFP.
6. The vendor accepts the Center's right to cancel the RFP at any time prior to Contract award.
7. The vendor accepts the Local Authority's right to alter the timetables for procurement that are set forth in the RFP.
8. The Proposal submitted by the vendor has been arrived at independently without consultation, communication, or agreement for the purpose of restricting competition.
9. Unless otherwise required by law, the information in the Proposal submitted by the vendor has not been knowingly disclosed by the vendor to any other vendor prior to the notice of intent to award.
10. No claim will be made for payment to cover costs incurred in the preparation of the submission of the Proposal or any other associated costs.
11. Local Authority has the right to complete background checks and verify information.
12. The individual(s) signing this document and any Contract awarded to vendor is authorized to legally bind the vendor.
13. No employee of the Local Authority and no member of the Local Authority's Board will directly or indirectly receive any pecuniary interest from an award of the proposed Contract to vendor. If the vendor is unable to make the affirmation, then the vendor must disclose any knowledge of such interests. See Attachment F.
14. The vendor is not currently held in abeyance or barred from the award of a federal or state contract.
15. The vendor is not currently delinquent in its payments of any franchise tax or state tax owed to the state of Texas, pursuant to Texas Business Corporation Act, Texas Civil Statutes) Article 2.45.
16. The vendor shall disclose whether any of the directors or personnel of Proposer has either been an employee or a trustee of Local Authority within the past two (2) years preceding the date of submission of the Proposal. If such employment has existed, or at term of office served, the Proposal shall state in an attached writing the nature and time of the affiliations as defined. See Attachment F.
17. The vendor shall identify in an attached writing any trustee or employee of Local Authority who has a financial interest in the vendor or who is related within the second degree by consanguinity or affinity to a person having such financial interest. Such disclosure shall include a complete statement of the nature of such financial interest and the relationship, if applicable. See Attachment F.
18. No former employee or officer of the Local Authority directly or indirectly aided or attempted to aid in procurement of vendor's service.
19. The vendor shall disclose in an attached writing the name of every Local Authority employee and/or member of Local Authority's board with whom the vendor is doing business or has done business during the 365-day period immediately prior to the date on which the Proposal is due. Failure to include such a disclosure will be a binding representation by vendor that the natural person executing the Proposal has

20. no knowledge of any key persons with whom the vendor is doing business or has done business during the 365-day period prior to the immediate date on which the Proposal is due. See Attachment F.

21. **Under Section 231.006**, Family Code, the vendor, or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated, and payment may be withheld if this certification is inaccurate. For purposes of the foregoing sentence, "vendor or applicant" shall mean vendor; contract, bid or application shall mean the Proposal; and 'this contract" shall mean any Contract awarded to the Successful vendor(s).

Signature of Applicant or Applicant's Authorized Representative Date

Printed Name

Title (if applicable)

ATTACHMENT E
CONFLICT OF INTEREST QUESTIONNAIRE

Please retrieve CIQ Form from the following website:
https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf
(Attach completed CIQ Form as part of your proposal)

A signature is required in Box 7 regardless of any other entry on the form.

ATTACHMENT F
DISCLOSURE OF KINSHIP

Pursuant to the Texas Administrative Code §412.54(c)

ATTACHMENT G
NOTICE OF FELONY CONVICTION

Pursuant to the Texas Health and Safety Code §250.006

ATTACHMENT H
FORM W-9
REQUEST FOR TAXPAYER INDENTIFICATION NUMBER AND CERTIFICATION

Vendors are to complete a W-9 Form and submit with Proposal Documents.
http://www.irs.gov/pub/irs-pdf/fw9.pdf

ATTACHMENT I
LOBBYING CERTIFICATION

The undersigned certifies, to the best of his or her knowledge and belief that:

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or an employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress an officer or employee of Congress or an employee of a member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

3. The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

_______________________________________ __________________________

Signature **Date**

____

Print name of Authorized Individual

____

Title of Authorized Individual

____

Organization Name

ATTACHMENT J
DEVIATION FORM

All deviations to this RFP must be noted on this sheet. In the absence of any entry on this Deviation Form, the prospective vendor assures LifePath of their full agreement and compliance with the Specifications and Terms and Conditions.

Each response to this RFP shall contain a Deviation Form, which states the prospective Vendor's commitment to the provisions of the RFP. An individual authorized to execute contracts must sign the Deviation Form. Any exceptions taken to the terms and conditions identified in this Proposal must be expressly stated in the Deviation Form. Use an additional copy or page if needed.

THIS DEVIATION FORM MUST BE SIGNED AND SUBMITTED WITH THE RFP BY EACH PROSPECTIVE VENDOR/CONTRACTOR WHETHER THERE ARE DEVIATIONS LISTED OR NOT. IF NO DEVIATIONS, NOTE: NONE

Reference Specifications, Terms and Conditions and Page Number	Deviation

____
Company Name

____ __________________________
Authorized Signature **Date**

NOTICE “NOT TO PARTICIPATE” FORM

Dear Vendor:

Please check the appropriate box below, complete the remainder of this form and return it PRIOR to the scheduled due date and time on the Proposal.

□ Our Company cannot provide the products, supplies and/or services listed in this request. Please MOVE our name and address to the following services so that we may submit bids/proposal at a later date:

Services:

____

□ Our Company has chosen NOT to submit a Proposal at this time but would like to remain on your list for this Proposal category. We did not submit a Proposal because:

Reason:

____

□ Please REMOVE our Company name from all LifePath Systems lists until further notice.

Company Name: ____

Representative:____Title:______________________________

Address:____ Phone: ____________________________

Email:____Other: _____________________________

Authorized Signature: ____

Title:____Date:___________________________

"EXHIBIT-A-LPS HRIS/PAYROLL Requirements-Vendor-Response"

Please use the following matrix as a key for responding to the functionality tables below. Exhibit A must be included in proposal.

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.
F - Future *	Feature is not currently included but will be available in a 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	Feature cannot be met.

Organization Structure	Code	Comments
Provides ability to export data to an organizational charting application.		
Structures the organizational chart based on the reporting relationships defined for each associate.		
Provides an on-line organization or report to chart.		
Establishes new organization entities (i.e., departments, divisions, cost centers, etc.) without vendor professional services.		
Adds/changes organization entities and easily transfers associates within and/or across entities.		
Manages organization restructuring including position control and salary changes.		
Provides the ability to establish exports to create organization charts for:		
Divisions		
Locations		
Pay groups		
Departments within company		
Recruiting & Applicant Management	Code	Comments
Communicates automatically with job boards.		
Posts internal and external jobs to company Internet site and company intranet site with effective dates.		
Has a requisition library of job templates that can be utilized when creating requisitions.		
Tracks expenses by applicant/candidate level and associate them with a specific requisition or a general recruiting activity.		
Sends automatic responses, notifications, or e-mails to applicants/candidates.		
Allows administrators to customize verbiage on the e-mail messages (including confirmation acknowledgement and job filled) to external and internal applicants/candidates		
Allows users to e-mail potential interview times, applications, corporate material, job opening status.		
Provides a library of standard communication correspondence for printing and distribution.		
Integrates seamlessly with standard e-mail systems (Microsoft Outlook, Lotus Notes) for applicant/candidate activity for hiring managers and recruiters.		
Allows administrators to schedule interviews, notify interviewers of times, locations, and topics to cover.		
Distinguishes applicant/candidate status for internal or external candidates.		
Associate's applications and resumes to a specific requisition without having to change screens/databases.		
Has history that consists of one candidate record with all the associated recruiting activity regardless of the number of requisitions.		
Can maintain a resume/application in the system.		
Can search a resume/application using key words.		
Stores resumes for future use by category, job title, skill, or other user-defined attributes.		
Allows applicants/candidates to modify or replace their existing resume.		
House interview question templates for each job		
Hiring managers and recruiters can review pre-screened applicant/candidate		
Hiring managers and recruiters can track applicant/candidate status		
Hiring managers and recruiters can schedule interviews		
Hiring managers and recruiters can communicate with applicants/candidates via e-mail		
Hiring managers and recruiters can view communication history		
Hiring managers and recruiters can report on communications		
View multiple recruiter schedules		
Hiring managers and recruiters can view and print assessments between applicants/candidates		
Hiring managers and recruiters can view and print applicant/candidates job history, qualifications and resume		

Hiring managers and recruiters can record interview notes		
Hiring managers and recruiters can enter additional applicant /candidate information if needed		
Searches applicants/candidates based on a variety of criteria (e.g., location, skills, prior employers, zip code, and metropolitan areas).		
Has embedded workflow for approvals based on company-defined process including requisition approval, offer approval, and new hire approval.		
Allows users to attach documents to an applicant/candidate record.		
Provides Web-based data collection for jobseeker users (both employee and non-employee)		
Allows administrators to determine which fields are required for completion by applicant/candidate and/or recruiters/hiring managers.		
Allows administrators to establish access levels in the system by role (i.e., administrator, recruiter, hiring manager).		
Increments requisition numbers automatically or entered manually.		
Allows users to enter and access secure Notes.		
Integrates with third-party screening services including criminal background check, drug testing and assessments.		
Allows applicant/candidate to choose if he/she would like to be alerted when a future position becomes available based on qualifications.		
Generates offer letters containing all compensation options to applicant/candidate		
Job openings will track the requisition number, status, and reason for the opening		
Job openings will include employment information including FLSA type, salary range, and full/part time indicator.		
Job opening will include education and skill requirements.		
Assist in the creation of and house job descriptions.		
Job opening will include Metropolitan Area and location information.		
Generates reports on all fields that exist in the database.		

Hiring	Code	Comments
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).		
Provides ability to automatically notify other areas of organization of new hire (IT, Fiscal, etc.)		
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.		
Manager is prompted to assign correct property to the employee.		
Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		

Termination	Code	Comments
Enables manager self-service request for termination workflow.		
Tracks terminations by reason (e.g. discharged, better opportunity, etc.), date, rehire eligibility, COBRA election.		
Maintains exit interview information.		
Can automatically cancel specified employee benefits upon termination.		

Onboarding	Code	Comments
Ability to predefine workflows and workflow tasks that vary according to the position being filled.		
Ability to delegate a proxy or change the owner for any specific task.		
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).		
Ability to output a well-formatted completed form to hard copy print.		
Ability for hires to return and update or correct their information after the initial submission.		
Ability to provide task response and status via email reply.		
Ability to measure the performance of the onboarding process.		
Ability to monitor the overall status of the onboarding process, providing a clear indication of "New hire readiness."		
Ability to make completion of one task a firm prerequisite to the initiation of other tasks.		
Ability to pre-populate form fields using data provided by unified Recruitment.		
Ability to brand the forms and pages seen in the new hire portal or page flow.		
Ability to automatically notify other areas of organization of new hire (IT, Fiscal, etc.).		
Ability to close the requisition tracker		
Ability to facilitate automation of new hire paperwork collection and new hire responses for all businesses within the company.		
Ability to link to person prior to bringing on board to enable new hire process to begin earlier.		
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).		

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.		
Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		
Ability to click a button to hire the person, and data is automatically routed to payroll, benefits, and other applicable areas.		
Ability to interface employee's I-9 to e-verify for United States.		
Ability to generate acceptance email notice/workflow notification to hiring manager, with start date.		
Ability to include range of documents, such as W-4, I-9, employee agreement, non-compete agreement, etc.		
Ability to provide electronic new hire packets, with ability to attach.		
Ability to deliver employment eligibility verification, with automatic status update and validation noted in employee profile.		
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	Code	Comments
Provide on-line support/instructions for completion of routine tasks.		
Establish new organizational entities (e.g., departments, cost centers, and other variables) with no IT or programming required.		
Add/change organizational entities and easily/effectively transfer employees within and/or across them.		
Maintain employee demographic data for all employment-related details (e.g., birth date, employee number, gender, hire date, contact information).		
Maintain ethnic, visa, and I-9 related data.		
Maintain marital, family, and dependent/beneficiary related and tax-related elections.		
Maintain historical data for current/former employees (e.g., names, employment, job/assignments, performance ratings, status, and pay).		
Maintain audit trails of employee file and data updates by date, time, and origin of update.		
Generate, identify, and track employees by unique employee number. Track Social Security Number for U.S. based employees.		
Maintain language, education, and certification data.		
Establish jobs/roles/positions and all relevant details.		
Maintain data for all job-related details (e.g., grade, exemption status, EEO code, salary, job family).		
Make simultaneous changes to large employee groups (e.g., new hires, salary changes, transfers).		
Enable effective/future dating of pending transactions/events and maintain transaction history.		
New hires automatically route approval based on company's hierarchy.		
Routes job/salary changes electronically for approval based on user defined approvals.		
Managers can view employee salary information with workflow.		
Managers can submit new hires to HR Department for onboarding/offers		
Managers can run reports.		
Managers can create ad-hoc reports based on security access.		
Managers can view employee employment records.		
Progressive disciplinary actions can be tracked and reported.		
E-mail alerts can be generated based on system or user defined events.		
Data/transactions submitted by managers automatically validate for accuracy and completeness.		
Life-to-date history on all employee fields.		
Audit trails for all additions, updates, and changes.		
Retains employee status code history.		
Narrative history (e.g., disciplinary actions, grievances).		
No limit to historical data captured.		
Unlimited user defined fields.		

Compliance	Code	Comments
Changes to compliance requirements are maintained and updated by HRIS vendor.		
All compliance reporting can be generated for current periods and historical periods.		
Standard compliance reports include:		
EEO-1		
OSHA 300 and OSHA 301		
Multi-Worksite Reports		
Vets-100		
Automatic notification of I-9 expiration/visa expiration.		
Tracks any accommodations made to support the American with Disabilities Act (ADA).		
Tracks ADA and disability information.		
Provides military and veteran status for employees.		
Includes affirmative action compliance features.		

Provides worker's compensation support.		
Creates separate, mandated government reports for each individual tax entity.		
Includes state-mandated "New Hire" reports (for child support payment tracking).		
Updates from HRIS vendor when federal/state/local regulations change.		

Performance Evaluation	Code	Comments
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.		
Intuitive user experience that eliminates the need for end-user training for administrators, employees, and managers.		
Solicits performance feedback from multiple reviewers (e.g., subordinates, directors, other managers, peers) and exchanges data among multiple users simultaneously.		
Saves work in process/draft reviews and provides option to return to complete.		
Enables administrators to assign different review forms for different employees within the same review cycle.		
Enables employees to complete self-evaluations.		
Tracks performance review status and dates (e.g., complete, incomplete).		
Provides email reminders and overdue notices throughout the process.		
Maintains performance feedback and ratings history.		
Provides historical reviews that can be accessed easily by managers or administrators.		
Enables administrators to view the status of the review process at any time.		
Provides delivery of standard competencies and objectives.		
Provides goals management that allows either the employee or manager to create and add their own personal goals or objectives.		
Enables individual weighting of goals.		
Provides ability to assign employee performance objectives that align with your overall business strategy.		
Provides access to all talent factors, including employee information, review history, skills and competencies, education, salary history, and learning history, based on role.		
Enables reporting and analysis of performance ratings for various employee groups (e.g., by job, manager, geography).		
Provides a centralized gateway for managers to monitor the progress of their performance management activities — in one place.		
Summarizes performance review in an easy-to-read format that can be printed for future reference.		
Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		
Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		

Succession Management	Code	Comments
Stores multiple iterations of possible succession plans for each team/leader.		
Provides printable/PDF capabilities.		
Allows configurability by the client (ASM) or allows hard coding from the vendor.		
Provides the ability to track and report on critical roles and critical talent.		
Delivers robust reporting, including exception reporting.		
Provides the ability to track core competencies associated with next/future job.		
Provides the ability to track the date/timeframe an employee will be ready for the next position.		
Provides the ability for employees and managers to create a development plan based on license, skills, training, education, and competencies.		
Provides the ability to track multiple language proficiency information, including speaking, reading, and writing, for each employee.		
Provides the ability to maintain multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.		
Provides the ability to track and search on the following data:		
skill description		
experience level		
proficiency level		
competency description		
Provides the ability to track employee professional associations. Specify limit.		
Provides the ability to identify where employees are in their current performance and potential growth.		
Provides the ability to provide audit records.		
Provides the ability to be delivered with standard competencies and objectives. Administrators should be able to add and modify client-specific, effective-dated competencies,		
Enables the graphic display of the manager's direct report organization.		

Employee Relations	Code	Comments
Tracks disciplinary actions including a description of the incident.		

Managers and HR staff can record the type of action taken (i.e., written warning, verbal warning, termination).		
Records required follow-up steps and the time frame for completion.		
Schedules review of employee response to actions.		
Grievances can be viewed in summary format.		
Managers can drill into specific grievances.		
Tracks the date and type of grievance (i.e., inequality, unfair pay, unfair working conditions).		
Tracks final outcome of the grievance and the date it was closed.		

Employee Development	Code	Comments
Tracks core competencies associated with next/future job.		
Flags employees that are recommended for a specific job.		
Tracks the date an employee will be ready for the next position.		
Managers can create a career plan based on license, skills, training, and education.		
Tracks multiple language proficiency information including speaking, reading, and writing, for each employee.		
Maintains multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.		
Does the system track the following data?		
Skill code		
Skill description		
Experience level		
Proficiency level		
Last date skill used		
Tracks employee licenses and certification and expiration dates.		
Tracks employee professional associations. Specify limit.		

Organization Charts	Code	Comments
Provides ability to export data to an organization charting application.		
Provides a standard employee export that provides data in the required format.		
Generates organization chart without requiring the user to make any changes.		
Provides ability to create more customized export templates.		
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:		
Departments		
Locations		
Pay groups		
Organization levels (by using the company and data selector options).		
Tracks open positions in the organization chart.		

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

Supports multiple arrear types.		
Includes defined start and stop dates for benefit/deduction.		
Processes one-time benefit/deductions.		
Maintains and tracks savings bond benefits/deductions.		
Restricts participants from receiving more than the annual limit for reimbursement accounts including 403(b), 401(k), FSA, HAS and Retirement.		
Includes pre-tax and post-tax benefits/deductions.		
Supports a designated default amount for each deduction code.		
Supports multiple types of life insurance, long term disability, and short-term disability.		
Supports Retirement, FSA, HAS accounts.		
Display flexible spending account information such as:		
Plan information		
Balance of funds in account (s)		
History of transactions for reimbursements		
Maintains updated FSA balance.		
Includes minimum check option for FSA, HAS and Retirement.		

Open Enrollment	Code	Comments
System provides next-year enrollment capability while in current year.		
From a Web browser, employees can:		
View current benefits and related information.		
Compare current benefits to the new benefits employees may choose to elect.		
Compare the cost of current versus new benefits.		
Make benefit elections from a list of eligible benefits.		
Keep existing benefit elections with no changes.		
Modify existing benefit elections.		
Make new benefit elections to replace existing benefits.		
Waive or decline benefits.		
Review, add, modify, and remove dependents and beneficiaries.		
Review benefits and summary description documents.		
Link to benefit plan provider Web sites for additional information to help in making informed benefit and provider choices.		
Save “in progress” enrollments and then later return to modify choices, make additional elections and complete the enrollment process.		
Make life event (e.g., baby, marriage) benefit changes.		
From a Web browser, managers can:		
Describe benefit plans and include specific plan details.		
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).		
Specify the display order in which each benefit plan is viewed by the employee.		
Identify required and optional activities that designate an active versus passive enrollment.		
Limit the number of dependents to the employee for each benefit plan offered.		
Limit the number of dependent relationships to the employee for each benefit plan offered.		
View the statuses of all enrollments.		
Investigate 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.		
Add or modify employee elections.		
Send due date reminders using an integrated e-mail feature.		
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).		
Create Internet links to benefit plan provider Web sites so employees can obtain additional details to help them make informed choices.		
Attach enrollment worksheets for employees to use when making life event benefit changes.		
Report and track benefits-related information and activities as they relate to new hires, benefit group changes, dependents, session setup, employee elections, and terminations.		
Export employee enrollment data (e.g., 401(k) 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.		
Supports default benefits which can be set up for new hires.		
Supports unique enrollment dates for each benefit plan.		
Provides a next year enrollment capability.		
Provides ability to report life event (e.g., marriage) and allow “eligible” changes to benefit elections.		
Allows updates to dependent information for life events.		

Life Events	Code	Comments
Allows online enrollment form for associates to use when making life-event benefit changes.		

Supports life events processed through the associate self-serve function of the system.		
Provides online ability to make life event changes (marriage, birth of a child, death, divorce).		
Automatically prompts “eligible” changes to benefit elections when life event change made.		
Allows update to dependent information for life events.		
Allows removing a dependent.		
Alerts student status end date to associate and employer		
Allows update address changes.		
Allows change in marital status.		

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

Paid Time Off/Vacation/Personal/ Sick	Code	Comments
PTO accruals and leave administration can be processed without Time and Attendance feature.		
PTO plans can be configured for a lump sum accrual on an annual basis.		
PTO plans can be configured to accrue based on length of service and user defined rates.		
PTO plans can be configured to accrue based on user-defined frequencies.		
Per number of days		
Per number of weeks		
Per number of months		
Per number of years		
Per fixed date		
Per included hours		
Per included earnings		
Per pay period		
Per customer defined rules		
PTO plans can be configured to adhere to user-defined carryover rules.		
Supports unlimited types of leave.		
Tracks the approved date when the employee’s leave of absence is expected to start.		
Tracks the approved date when the employee is expected to return from the leave.		
Tracks and reports cumulative (FMLA) time taken.		
Maintains leave of absence history.		
Calculates the planned duration based on expected end and start dates.		
Employees can view PTO/leave plan balances and pending requests.		
Workflow approval processes are included for PTO/leave requests initiated by employees or managers.		

Flexible Spending Account (FSA)/ Health Savings Account (HSA)	Code	Comments
Supports associate enrollment.		
Enrolls associates in FSA/HSA plans through benefits open enrollment.		
Maintains two open plan years so reimbursements can be paid from one year, while beginning claims processing for the new benefit year.		
Restricts participants from receiving more than the annual contribution election limit for reimbursement accounts.		
Supports associate enrollment.		

COBRA	Code	Comments
Defines employee’s COBRA status, date of qualifying COBRA event, description of COBRA event, and date the COBRA notification letter was sent.		
Defines dependent’s COBRA status, date of qualifying COBRA event, description of COBRA event, and the date the COBRA notification letter was sent.		
Automatically captures COBRA information during the termination process		
Automatically generates COBRA notifications.		
Create COBRA notification letters and invoices.		

Exports all employee and dependent COBRA information to a third-party COBRA administrator.		
Generates COBRA billing documents		
Maintains COBRA payment history		

Position Management	Code	Comments
Provides position management reports by different organizational levels.		
Tracks headcount and full-time equivalents (FTE) associated with positions.		
Tracks multiple position assignments for an employee.		
Calculates FTEs in multiple ways.		
Stores unlimited history of changes recorded to the position record.		
Tracks unlimited history of changes to employee position assignments.		
Records information for replacement planning, indicating possible new positions for employees.		
Integrates with recruitment and staffing feature for establishing requisitions.		
Supports the generation of organization charts based on position “reports to” hierarchy.		
Tracks status of position approval.		
Allows overstaffing for positions.		
Prohibits assignments to a position if overstaffing is not allowed.		
Allows position codes in the GL distribution.		
Allocates employee pay by position code automatically.		
Assigns position number manually or automatically.		
Provides on-line position incumbent data.		
Provides on-line prior position incumbent data.		
Indicates budget period.		
Maintains approved budget by position including dollars, hours, and FTEs.		
Tracks current budget accumulators and provides on-line views.		
Tracks budget variances.		
Maintains multiple budget plan years on-line.		
Standard reports that assess budgeted vs. actual FTE’s and dollar amounts.		

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

Earnings	Code	Comments
Provides an unlimited number of earnings codes		
Pays various earnings types (e.g., severance or bonus) after an employee is terminated on system.		
Provides automatic gross up calculation for earnings.		
Allocates earnings by different organizational levels.		
Delivers all federal, state, and local earnings tax categories.		
Calculates and initiates off-cycle/special payments (e.g., signing bonus, annual bonus).		
Delivers an expression builder to create company specific earnings calculations.		
Allows for earnings to be scheduled in the payroll calendar.		
Specifies start and stop dates for earnings.		
Differentiates which earnings to include/exclude from other calculations (e.g., shift, deferred compensation).		
Earnings codes are specific for different types or groups of employees (e.g., part time or executive).		
Tracks YTD amounts, by earnings type, for unlimited number of years in check detail history.		
Tracks YTD hours worked, by hours type, for unlimited number of years in check detail history.		
Supports the calculation of taxable fringe benefits.		
Supports the calculation of imputed income.		
Provides ability to enter non-taxable reimbursements.		
Handles employees with multiple rates of pay.		
Calculates various shift premiums.		
Accurately pays shift premium for employees who work multiple shifts.		
Ability to calculate overtime for various times.		
Calculates co-efficient overtime on the payroll input screen.		
Distinguishes between regular and premium wages for workers’ compensation.		
Automatically accumulates hours and earnings by various periods.		
Employees can view YTD earnings through employee self -service.		

Define hours per week by employee or job level.		
Is file ID# unique i.e. no instances where a new number needs to be reassigned a new number regardless of entity.		

Deductions/Benefits	Code	Comments
Provides an unlimited number of deduction codes.		
Calculates garnishments based on the state and federal calculation rulings.		
Stores other relevant garnishment data at the deduction level (e.g., case number, payee).		
Delivered logic to properly calculate multiple garnishments.		
Capability to send child support and/or other payroll deduction information to appropriate agency for processing.		
Delivers all federal, state,,and local deduction/benefit tax categories.		
Accommodates one-time deductions.		
Delivers an expression builder to create company specific deduction calculations.		
Allows for deductions to be scheduled in the payroll calendar.		
Allows client-defined prioritizing of deductions.		
Associates goal limits to deduction codes.		
Supports start and stop dates for deductions.		
Automatically cancels specified employee deductions upon termination based on company business rules.		
Supports effective dating with deductions.		
Includes a rate table at the company level for benefit deduction amounts, so they are not manually entered on each employee.		
Deduction cost can be entered for the new year, while continuing processing for the current year		
Deduction codes are specific for different types or groups of employees (e.g., part time or executive).		
Tracks YTD amounts, by deduction type, for unlimited number of years in check detail history.		
Allocates deductions by multiple organizational levels.		
Maintains unlimited history of all deduction changes.		
Automatically accumulates deductions by:		
Fiscal-year-to-date		
Year-to-date		
Quarter-to-date		
Month-to-date		
Last payroll		
Allows employees to view YTD deductions through employee self-service.		
Ability to temporarily override deduction amounts		
Temporarily inactivate deductions at the employee level one-time or on an on-going basis		
Temporarily inactivate deductions at the company level to affect all employees		

Calculating Pay	Code	Comments
Supports unlimited earnings, deductions, and tax codes.		
Supports different types of income.		
Supports associates with multiple rates of pay and department/cost center assignments.		
Tracks associates with multiple pay rates and departments/cost center assignments.		
Maintains and updates overtime and pay specific rules including state specific rules.		
Supports automatic retroactive pay calculations and payments.		
Enables date-driven salary changes (allowing past and future changes).		
Allocates by different organizational levels and/or projects.		
Calculates shift differentials and job premiums automatically.		
Automatic calculations		
Performs gross to net calculations per associate per check and are immediately viewable.		
Calculates and initiates off-cycle and special payments (e.g., signing bonus, annual bonus).		
Provides automatic gross up calculation for earnings.		
Overtime calculations fr various periods.		
Guaranteed overtime (e.g., paid overtime for working Saturday even if normal work week does not exceed 40 hours)		
Customer can override an associate's paycheck by entering or changing:		
Tax frequency		
Method of payment (check vs. direct deposit)		
Rate of pay		
Shift codes –		
Hours		
Earnings		
Deductions		
Deduction arrears		
Taxes (State, Federal, and Local)		
Allocation fields (dept, project, location, etc.)		
Non-Wage Income		

Handles earned income credit.		
Handles imputed income by pay period.		
Handles moving expenses to reflect as income		
Wage Allocations		
Supports multi-tier wage allocations across multiple cost centers		
System provides wage allocations by:		
Companies		
Departments		
Divisions		
Regions		
Locations		
Branches		
Cost centers		
Projects		
Pay groups		
Terminated Associates		
Automatically stops deductions and calculates final pay based on associate's termination date (including PTO, benefit deductions, etc.).		
Identifies associates who have pension dollars required to be paid out at termination.		
Reporting		
Provides standard wage allocation reports		
Reports can be created with actual cost allocations including:		
Rate of pay		
Shift codes – How many are allowed?		
Hours		
Earnings		
Deductions		
Deduction arrears		
Taxes (State, Federal, and Local)		

Taxes	Code	Comments
Provides for all federal, state and local taxing jurisdictions within the United States and its territories.		
Provides for all taxing jurisdictions for international locations.		
Supports tax calculations of lived in versus worked in state and local payroll taxes.		
Supports state and local reciprocal agreements.		
Provides all relevant end of year payroll processing reports, including W-2, 941, State, SUI, and worksite reporting.		
Supports the outsourcing of payroll tax deposits and filings.		
Vendor can provide a print service for W-2s.		
Supports client with preparing tax deposits and filings internally.		
Produces tax documents, magnetic media, and signature ready reports to file.		
Allows a customer to create/print their own W-2s.		
Allows an employee to view/print their own W-2.		
Supports federal, state, and local supplemental wage taxation.		
Allows for earnings to be taxed at different tax rates (e.g., regular and supplemental) on the same check.		
Delivers all wage tax categories for wages reported (e.g., W-2, 1099).		
Maintains tax rates within the proposed system.		
Maintains a history of tax tables by change date.		
Employees can change W-4 information via a Web portal.		
Supervisors can change employee W-4 data via a Web portal.		
Tax documents (e.g., signed W-4, I-9) can be attached to an employee's record.		
Employees can perform paycheck modeling.		
Provides a payroll tax reconciliation tool.		
Tracks YTD taxes, by tax, type for an unlimited number of years in check detail history.		
Tracks YTD taxable wages, by tax type, for an unlimited number of years in check detail history.		
Accommodates separate tax-exempt controls for federal, state, and local taxes.		
Provides additional withholding fields for federal, state, and local taxes.		
Supports one-time additional tax amounts in payroll processing.		
Allows for payroll adjustments to correct taxes to be posted to current quarter.		
Allows for payroll adjustments to correct taxes to be posted to a prior quarter.		
Allows for a payroll administration user to generate an employee W-2C.		

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

Payroll Processing	Code	Comments
Run supplemental payrolls at any time.		
Provides for pay data entry by:		
Employee online		
Manager online		
Batch uploads		
Import from third party time and attendance solution		
Exception-based/autopay (e.g., salaried or fixed hourly employees).		
Performs gross-to-net calculations per employee per check, which are immediately viewable.		
User can override an employee’s paycheck by entering or changing:		
Tax Frequency		
Method of payment (e.g., check vs. direct deposit)		
Rate of pay		
Hours		
Earnings		
Deductions		
Deduction arrears		
Taxes		
Allocation fields (e.g., dept, job, project, location)		
Performs gross up calculations.		
Allows for an unlimited number of checks issued to an employee per payroll processing.		
When preparing multiple checks for an employee during a payroll process, options exist for direct deposit or live check as well as the ability to exclude or process deductions.		
Provides pre-check registers and audit reports prior to processing payroll.		
Allows for manual checks to be printed onsite or any location.		
Voids payroll checks by selecting the appropriate check; changes should be applied to applicable quarter’s totals.		
Provides capability to re-run selected steps of the payroll process.		
Provides for check reconciliation.		
Using Web browser, administrators can run the entire payroll process including:		
Collect employee time		
Open payroll		
Calculating pay (including gross-to-net)		
Pre-check preview and editing		
Check payroll processing status		
Generating pay checks and/or direct deposit advises		
Payroll reporting		
GL reporting		
Post payroll		
Close payroll		
Create manual checks (interim, voided)		
Print checks from the Web		
Update deduction goal amounts		
Perform check reconciliation		
Tax filing		
Supports different types of payment methods (e.g., direct deposit, live check).		
Print checks in any order, which may differ from payroll registers.		
Proposed vendor can provide check printing services.		
Provides internal check printing capability.		
Supports laser printed pay statements to include MICR coding and signatures.		
Supports unlimited check detail history.		
Provides online pay statements to employees without creating paper statements.		
Allows for paid time off information (e.g.,. vacation) to be on pay statement.		
Supports paying employees from different bank accounts.		
Create an “ACH” file for direct deposit.		
Can rerun “ACH” file to include adjustments.		
Allows employees to have up to 99 direct deposit accounts.		
Supports partial direct deposits in either a flat dollar amount or a percentage of an employee’s pay.		
Supports Positive Pay.		
Process a refund (negative deduction) with no earnings, pretax and after-tax deductions (taxes adjusted with refund).		

Check Management	Code	Comments
Supports different types of payment methods (e.g., direct deposit, live check, etc).		
Supports printing checks in any order, which may differ from payroll registers.		
Supports check printing services by vendor.		
Supports unlimited check detail history.		
Provides online pay statements to associates, without creating paper statements.		
Allows for Paid Time Off and Accrued Absent Time (AAT) information to be on pay statement.		
Creates an ACH file for direct deposit.		
Allows customer to rerun ACH file to include adjustments.		
Voided Checks		

Provides ability to void checks by number and reversals are immediately fed to the general ledger.		
Provides ability to enter multiple check voids by range.		
Direct Deposits		
Handles direct deposit to multiple financial institutions in various federal reserve districts.		
Allows for an unlimited number of checks issued to an associate per payroll processing.		
Allows for manual checks to be printed onsite.		

Labor Allocation	Code	Comments
System provides for an unlimited number of the following:		
Companies in one database		
Departments		
Divisions		
Locations		
Cost centers		
Jobs		
Supervisors		
Pay groups		
GL base accounts		
Tracks an unlimited number of labor distributions in history.		
Allows at least four client definable organizational levels.		
Supports a multi-tier labor allocation (e.g., allocation on different cost center, dept, job, location).		
Reports can be created with actual cost allocations including:		
Earnings		
Employee deductions		
Employee taxes		
Net pay		
Employer deductions		
Employer taxes		
Workers' compensation premiums		
Supports the creation of labor allocation files with user defined timeframes (e.g., 1 payroll period or 7 payroll periods).		
Allows actual labor allocations to be fed into General Ledger.		
Creates labor allocation reports.		
Allows for end of month accrual processing		

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

Time & Attendance	Code	Comments
Includes multiple rounding rules by pay group.		
Multiple grace periods by pay group.		
Unlimited number of user defined time/earnings codes		
Includes the definition and application of complex pay rules based on timesheet details.		
Date effective recording of all timesheet- and employee-related data.		
Can maintain and modify all complex pay rules without vendor intervention.		
Allow employee punch captured for start and stop times of breaks and lunches.		
Allow group change capabilities to modify common elements in a group of employee timesheets.		
Employees can enter hours using on-line timesheets and/or mobile app.		
Timesheet values can be adjusted by week and selected days within a week by authorized users.		
Provides a comprehensive audit trail of all changes made to the timekeeping records.		
Tracks both standard and actual hours by activity code for analysis purposes.		
Stores employee (contractor) hours to be withheld from payroll upload.		

Retro calculations based on payroll transfer date.		
Allow the viewing of overtime by employee(s) by time period.		
Allow validation of over 100,000 docket codes, in an on-line fashion, when activity code is entered at timekeeping device.		
Includes various types of payroll lockdown dates to freeze timesheet edits for payroll processing (i.e. supervisor lockout date, hands-off date, etc.).		
Allow a fully reconciled payroll, labor and job activity information captured and maintained within the application		
Allow the tracking of labor metrics (includes project, job, department, and dockets).		
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		
Allow employees to punch in and out and make position changes on-line or on mobile app		
Allow on-line edits to daily timesheets by employee and by authorized users.		
Allow real time access to activities and related costing information.		
Allow the validation of absence codes against associated leave balances.		
Allow for absence tracking with year at a glance scoring and analysis.		
Allow for the viewing employee attendance data for a given year.		
Allow employees to request time off, tracks status with dynamic validation against time off business rules.		
Allow for the employee to view their timesheet along with weekly hours and costs.		
Allow for non-technical personnel to generate standard reports via a web-based, wizard-style interface.		
Allow for scheduled reports to run automatically and be distributed to specific users/distribution lists, via email or other means of distribution.		
Allow for the building, modification, and maintenance of custom reports by non-technical employees.		
Allow for the report hours of worked/dollars earned by employee by selected date range.		
Allow the reporting employee leave balances totals.		
Allow for reports to be created by copying an existing report and modifying it.		
Allow for the routing of exception report results to supervisors.		
Allow for business intelligence rules to be built supporting customer specific requests.		
Tracks FMLA including intermittent leave.		
Report on FMLA status include intermittent leave based on rules established.		

History	Code	Comments
Provides a narrative history (e.g., for disciplinary actions, grievances, exit interviews).		
Provides point-in-time reporting capability.		
All historical data is viewable.		
All historical data is reportable.		
Maintain unlimited history on the following:		
Job information		
Salary and wage data		
Evaluation and performance data		
Career, skills, and education		
Training information		
OSHA and workers' compensation data		
Organizational changes		
Employee status		
Benefit elections		
Paycheck details		
Earnings detail		
Deduction detail		
Tax detail		
Archives older historical records.		
Can bring firm history from prior software.		

Employee Interface	Code	Comments
Employees can view communications posted from administrators.		
Employees can access links that can launch:		
Documents (forms may be saved and/or printed).		
Web sites/ Mobile App		
E-mails		
Employees can model their paycheck for changes including deductions, marital status, and exemptions.		
Employees can view and/or update personal information including:		
Name		
Address		

Phone numbers		
Emergency contacts		
Previous employment		
Educational background		
Employees can view their status and key dates.		
Employees can view company property assigned to them.		
Employees can view EEO/I9 information.		
Employees can view job information including:		
Job code and title		
Date and time in job		
Compensation		
Supervisor.		
Organizational levels		
Unlimited job history including change reasons		
Unlimited performance review history		
Unlimited salary review history		
Licenses		
Skills		
Tests		
Awards		
Employees can view unlimited pay history including:		
Net pay		
Hours by code		
Earnings by code		
Deductions by code		
Taxes by code		
Direct deposit distribution		
Employees can view current and previous year-to-date totals.		
Employees can view and update their direct deposit distribution and set effective date.		
Employees can download and print their W-2.		
Employees can designate that the electronic copy of the W-2 is the only copy that they require.		
Employees can enter time transactions.		
Employees can view benefit information including:		
Current benefit elections		
Employer contributions by code		
Beneficiaries and dependents		
PTO accruals and balances		
Cobra qualifying events		
Participate in an electronic open enrollment		
View all eligible plans		
View the costs associated with these plans		
Choose their benefit plan and coverage option		
Request time off from their manager		
Employees can update current benefits coverage based on the following life events:		
New hire		
Adding a dependent		
Removing a dependent		
Change in marital status		
Change in address/location		
Employees can view documents attached to their employee record.		
Employees can view open jobs.		
Employees can apply for open jobs.		

Manager Interface	Code	Comments
Managers have access to the entire employee self-service capability.		
From a Web browser/ Mobile App, managers can search for employees by name or employee number.		
From a Web browser/ Mobile App, managers can view and/or modify the following information:		
Employee personal information		
Employee job information		
Employee job history		
Employee compensation history		
Previous employment information		
Educational background		
Licenses and certifications		
Salary reviews		
Performance reviews		
Begin requisition process to create job openings		
Review and approve vacation request		
Review and approve leave request		
Update organization information (e.g., department, division, supervisor).		
Assign employee paid through dates		
Attach documents to an employee record		

Establish whether attached documents are viewable by the employee		
Begin termination workflow process.		
Access on-line forms/checklist, etc.		

System Administration	Code	Comments
Offers role-based security (system access based on an individual's role within the organization).		
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).		
Offers the ability to copy roles when creating them.		
Includes built-in workflows.		
Includes a Web business rules feature that enables administrators to view and edit entries in code and description tables.		
Includes a company communication posting feature that enables you to make company information available 24 x 7 to users via the Web Mobile App.		
Includes the ability to upload and securely share documents such as Microsoft Word documents, Excel spreadsheets, and PDF files.		
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).		
Includes the ability to designate whether page links will appear inside the product framework or be launched in a second browser.		
Includes the ability to customize the color scheme for your Web pages.		
Includes the ability to re-brand the Web pages (i.e., use your own logo).		
Includes the ability to add your own menu items and Web pages, and still be contained within the system's security framework.		
Includes the ability to establish user-defined fields on Web pages.		
Offers the choice to display or not display user-defined fields on employee Web pages.		
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.		
Generates data-driven usernames and passwords to increase the options for creating Web user login names and default passwords.		
Allows you to view user login activity.		
Adds non-employee users (e.g., IT support, auditors) as system users.		
Activates new Web users automatically or manually.		
Terminates employees' Web access inactivated automatically or manually.		
Resets user passwords.		
Requires strong passwords (case sensitive).		
Requires that passwords expire based upon a specific number of days designated by the system administrator.		
Requires that passwords for a given user are always different by maintaining password history.		
Stores and displays password hints to help remind users of their passwords.		
Uses a mass password reset to change the default password for one or all users.		
Ability to secure at a field level.		
Ability to audit who has viewed/changed items in the system.		
Can the system establish single log on for all components of system and multi factor authentication log on.		

Workflows	Code	Comments
Provides built-in approvals for a hierarchy (multiple levels) of approvers.		
Provides for approval by role, where anyone who is assigned the role can approve incoming requests.		
Allows the re-allocation or delegation of tasks from one approver to another.		
Allows the assignment of observers and e-mail recipients to workflow processes.		
Automatically send e-mail notices to approvers to inform them that they have a request that requires attention.		
Automatically sends e-mail notices to the initiator of a request to let him/her know it has been approved.		
Allows users to view outstanding workflow transactions in various states such as pending or complete		
Allow out of the office delegations to automatically manage workflows during an individual's absence		
Allow users to cancel pending workflows (e.g., when an employee leaves the company).		
Provides wizards to walk managers through work event processes.		
Uses audit trails to capture all modifications to employee information.		
Captures the date and time when a request was approved.		
Captures who approved a request.		
Captures approver comments associated with a request.		
Performs real-time updates to employee information.		
Allows users to make date-sensitive changes, which are applied on the desired date.		
Allows users to view summary statistics about all workflow activity.		
Allows workflow e-mail messages to be customized.		

Displays warning and error messages to users in relation to requested changes.		

Reporting	Code	Comments
Provides standard report capabilities.		
Provides ability to schedule standard reports.		
Provides access to unlimited years of check and schedule history.		
Provides flexibility for defining selection criteria, data ranges, sorting and grouping options, and report output enabling users to tailor information to their specific needs.		
Provides ability to set up and run batch reports.		
Provides ability to access reports area from within the system.		
Provides user-friendly, graphical user interface for accessing and running reports.		
Provides point-in-time reporting capabilities.		
Provides integrated ad hoc report writer.		
Generates reports on all fields that exist in the data dictionary.		
Allows for incorporation of graphics such as logos.		
Provides easy-to-use report catalog; user is not required to understand the database design.		
Presents data in a way that makes it easy for users to navigate within a database and assemble reports.		
Provides ability to change field names.		
Provides “open” system so that it can be used with other report writer tools.		
Provides managers with standard pre-formatted reporting functionality.		
Managers can run reports on live data		
Managers can select report criteria at run time		
Access to reports is based on a manager’s role (filtered security setup).		
Data on reports is filtered by the manager’s security (filtered security setup).		
Report results can be stored		
Managers can view and reuse a previously stored report		
Managers can select a report sort order		
Manager can select a report group order		
Manager can select report page breaks		
Managers can set expiration dates for reports		
Managers can output reports in PDF format		
Managers can output reports in Excel format		
Ad hoc Reporting from a Web browser		
Ad hoc reports can be scheduled		
Reports be run while managers are in other parts of the system		
Managers can store and access previously run reports		
Managers can create custom reports		
Reports can be assigned an expiration date for automatic purging		
Does the system have the ability to export reports in a format that may be sent to recipients electronically without manual reformatting?		
Can letters be generated as well as mailing labels in multiple formats directly from the system?		
Can the system perform calculations within reports such as Turnover and Retention rates for a specific time interval?		