REQUEST FOR PROPOSALS FOR
HUMAN RESOURCES / PAYROLL SOFTWARE

Issued By:

Betty Hardwick Center

Chris Mabry

2616 S. Clack St.

Abilene, TX 79606

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Date of Issue: September 9, 2019
Due Date: October 11, 2019

Request for Proposal Notice:
Betty Hardwick Center requests proposals for the provision of a software package(s) to manage Human Resources functions, data and payroll functions.

Objectives:
Betty Hardwick Center would like to offer your company the opportunity to become a possible and strategic vendor to our organization. Betty Hardwick Center would like to give each vendor the descriptive background of current requirements for Betty Hardwick Center's HRIS solution requirements.

Background Information:
Betty Hardwick Center is a local community center that provides mental health and intellectual and development disability services in 5 West Texas counties. Across our region, we operate facilities that specialize in personal, professional and compassionate care for each and every client. We have approximately 200 employees. For more information, visit www.bettyhardwick.org.

Requests for Proposals:
Proposals should be sent electronically. Proposals may be sent to 2616 S. Clack St., Abilene, TX 79606, Attention: Chief Financial Officer. Proposals should be received by Chris Mabry no later than 5:00pm on October 11, 2019. Proposals shall take careful notice of the following conditions for this Request for Proposal:

> During the RFP response preparation period ending 5:00pm on October 11, 2019, no verbal/telephone requests for information will be accepted. You are encouraged to submit, via e-mail or by regular mail, questions, inquiries, and requests for clarifications to the contract named on the cover page.
>
> Betty Hardwick Center reserves the right to accept or reject without consideration any proposal that does not fully address the requirements of the RFP or arrives at the designated address and contact after the proposal due date and time identified.
>
> Proposals cannot be altered or amended after submission deadline. Any alteration, or erasure made before opening time, must be initialed by the signer of the proposal, guaranteeing authenticity.

Confidentiality Statement:
The information contained in this document is proprietary to Betty Hardwick Center. It is distributed to you for the sole purpose of providing information for your response to Betty Hardwick Center's Request for Proposal. As such, this document or any part thereof may not be reproduced or redistributed without written consent from Betty Hardwick Center.

Proposal Documents Required:
The following documents and forms in the following arrangement must accompany each submission.

Cover Page: This is to be used as the first page of the submission. This form must be fully completed and signed by an authorized officer of the firm.

Executive Summary: This part of the response to the RFP should be limited to a brief narrative highlighting the proposer's qualifications and experience. Typically, this section should not exceed 2-3 pages. This section should include general information such as basic corporate information; average size client, and how you distinguish yourself from the competition.

Firm Information / Organization: The proposer must identify the Account Manager who will be working directly with and engaged in managing the work. Resumes must be included which reference the individual's qualifications and experience in managing similar projects. List relevant projects worked on, dates showing length of time spent on each project and the specific duties responsibilities for each project.

Identify the responsibilities of the key individuals, other than the Account Manager, who will be assigned to the proposed contract, and who will have major responsibilities for performance of the services required. Include resumes that list relevant projects worked on, dates showing length of time spent on each project and the specific duties and responsibilities for each project.

Betty Hardwick Center reserves the right to approve or disapprove any change to the successful Proposer's Account Manager. Personnel changes that impact the contract may result in the cancellation of the contract.

Firm Experience: The proposal shall include references from past and current government entity clients for similar types of payroll services:

Client (contact person, address, telephone #, fax # and email)
Date contract stared to date completed (if applicable)
Nature of work for each contract (include all applicable modules / work processes)

Cost Proposal: The Cost Proposal must provide a detailed fee schedule including itemized services. The proposal must state clearly whether the costs are for a month subscription type product (ASP model) or in-house software including (but should not be limited to) the following:

- Monthly rates for regularly schedule activities and help desk support.
- Labor costs, administrative costs, equipment and materials, and sub-consultant or consultant team costs.
- Center staff training and implementation costs.

- A fee schedule for emergency and /or after-hours service calls also required.
- Specify price structure breakdown (e.g., based on number of employee 1-100 employees, 101-200 employees, etc.) as well as the cost per employee.
- If a specific requested service, function, or option is not offered / available please indicate.
- Indicate the frequency of cost (e.g., per payroll process, monthly, quarterly, annually, as required).
- Provide any one-time costs or costs that are not based on the number of employees.
- Include any general comments on pricing, or different levels of service.
- List software licensing fees if applicable.
- List charges for “special payroll reports” created by the vendor if applicable.
- It is expected that all proposers responding to the RFP will offer government or comparable most favorable rates. Any and all discount offers must be clearly delineated.

Cost proposal shall list each module / function separately and should include all purchase and implementations costs. Betty Hardwick Center may choose to implement all modules, one module, or any combination thereof. While the proposer may choose to offer additional discounts or cost savings for the initial purchase of all modules / functions combined. Betty Hardwick Center reserves the right to purchase modules / functions individually. In addition, all prices must be firm and fixed for at least one (1) year following the notice of the award.

Vendor Questionnaire: Answers to questionnaire will be used in Betty Hardwick Center’s evaluation of proposal.

Firm’s Current Workload and Schedule: Provide information supporting firm’s ability to perform in a timely fashion. Present workload of key personnel assigned to this project. Indicate that the personnel listed in the submittal shall be available for and assigned to Betty Hardwick Center based on illustrated workload. Indicate firm’s ability to meet budget and schedule. It will be important to limit response to similar projects based on current and near future workload.

Sub-consultants / Subcontractors: Contractor shall submit a list of sub-consultants and subcontractors. No substitutions shall be made without prior written approval by Betty Hardwick Center.

Intangibles: Describe any significant or unique accomplishments or awards for work performed for similar agencies. Provide any additional information which may be relevant to the evaluation of your submission relative to Betty Hardwick Center’s project.

Litigation: Please list any past and / or pending litigation or disputes relating to the work described herein, that the firm has been involved in within the last five (5) years. List shall include project name, nature of litigation and outcome of litigation (if resolved).

Licenses: Firm shall submit proof of licensing as may be required by local, state, or federal agencies perform the required work.

Proposal Forms:

- Proposal Cover Page
- Exceptions or Deviations Form
- IRS W-9 Form

Examination of Proposal Documents: Each vendor shall carefully examine the Specifications and other applicable documents and inform himself / herself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the Contractor will in no way relieve him / her of the obligations and responsibilities assumed under the Contract. Should a vendor find discrepancies or ambiguities in, or omissions from the Specifications, or should he / she be in doubt as to their meaning, he / she at once should notify Betty Hardwick Center, in writing by email to cmabry@bettyhardwick.org.

Changes / Modifications: Betty Hardwick Center reserves the right to order changes in the scope of work and resulting contract. The successful Proposer has the right to request an equitable price adjustment in cases where modifications to the contract under the authority of this clause result in increased costs to the contractor. Price adjustments will be based on the unite prices proposed by the Contractor in response to this solicitation. Any contract resulting from this solicitation may be modified upon written and mutual consent of both parties.

Evaluation and Selection Criteria: Each proposal received must adhere to the instructions, forms / content, and specifications. This will ensure that evaluation criteria can be systematically applied to all Vendors. The major criteria categories for selection and evaluation are listed:

- Satisfactory completion of all required responses
- Extent to which Vendors proposed solution fulfills Betty Hardwick Center's stated requirements as set out in this RFP
- Assessment of Vendor's ability to deliver indicated service in accordance with specifications set out in this RFP
- Completeness of solution
- Configurability for unique organizational characteristics
- Proposed project plan for transition, implementation, and integration of proposed solutions to Betty Hardwick Center's business model
- Most competitive ROI coupled with Best Value proposal

Final Selection and Award: Betty Hardwick Center will notify each participating vendor of the selection / approval or rejection of all or a portion of their proposal. This decision will be a final decision for awarding services under the RFP. Betty Hardwick Center reserves the right to reject any, portions of, or all proposals without giving reason for the reject, and to award a contract or contracts to the bidder of their choice. The resulting contract will be approved by Betty Hardwick Center Board of Directors.

Payments: Payments shall be made 30 days from the receipt of invoice and follow all Center policies promulgated thereby.

Indemnification: The successful Proposer must fully indemnify Betty Hardwick Center. Such indemnifications will be documented in the contract documents.

Additional Terms and Conditions: No additional terms and conditions included with the proposal response shall be evaluated or considered and any and all such additional terms and conditions shall have no force and effect and are inapplicable to this proposal. If submitted either purposefully through intent or design or inadvertently appearing separately in transmitting letters, specifications, literature, price lists or warranties, it is understood and agreed the general and special conditions in this solicitation are the only conditions applicable to this proposal and the Proposer's authorized signature affixed to the proposal attests to this.

Proprietary Information: Responses to this Request of Proposals, upon receipt by Betty Hardwick Center, become public records. If any proposer believes that any portion of all of the response is confidential and proprietary, proposer shall clearly assert such exception and the specific legal authority of the asserted exemption. Such designation of material submitted to Betty Hardwick Center as a "trade secret", the proposer agrees to hold harmless Betty Hardwick Center for any award to a plaintiff for damages, costs or attorney's fees and for costs and attorney's fees incurred by Betty Hardwick Center by reason of any legal action challenging the proposer's "trade secret" claim.

PROPOSAL COVER PAGE

Name of Firm, Entity or Organization:____

Federal Employer Identification Number (EIN):____________________________________

State of Texas License Number (If Applicable):_____________________________________

Name of Contact Person: ____

Title: ____

E-Mail Address: ____

Mailing Address: ____

Street Address (if different):____

City, State, Zip: ____

Telephone:___________________________________Fax:_____________________________

Organizational Structure – Please Check One:

_____Corporation_______Partnership_____Proprietorship_____Joint Venture______Other

If Corporation:
Date of Incorporation:_______________________State of Incorporation: _______________

States Registered in as Foreign Corporation: _______________________________________

Authorized Signature: ____

Print Name: ____

Signature: ____

Title: ____

Phone: ____

EXCEPTIONS OF DEVIATIONS TO SPECIFICATIONS

( ) Proposer understands and agrees to all terms, conditions, requirements and specifications stated herein.

Firm: ____

Signature: ____

( ) Proposer takes exceptions to terms, conditions, requirements or specifications stated herein. (Proposer must itemize each exception below and return with the Proposal Form.)

Firm: ____

Signature: ____

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Proposer should note that any exceptions taken from the stated terms and / or specifications may, but not necessarily will be cause for their submittal to be deemed “non-responsive”, risking rejecting of the submittal.

This document must be completed and returned with your Submittal

VENDOR QUESTIONNAIRE

Proposer must include in response to questions complete information about proposer's company and its ability to perform the requested services as described in the Scope of Work.

Organization Information

1. Identify your company name and headquarters, along with the name and headquarters of your parent corporation, if applicable. Provide address, main phone number and website URL.

2. Provide a corporate overview.

3. Provide your philosophy, vision, and mission statements.

4. Describe your company's ownership.

5. What is the history of your company?

6. Please provide a sampling of the awards your company has received.

7. What is the core product of your business?

8. How do you distinguish yourself from the competition?

9. Describe your client base for payroll and HR services. What is the average size of your client? What is your client retention rate? On average, how long do your clients remain with you?

10. Describe your organization's approach to research and development? What percentage of annual revenue is reinvested in research and development of new technologies?

11. Describe your dedicated department specifically designed for your product innovation.

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

Technology/Architecture

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

2. Detail the application response times, benchmarks for processes such as payroll processing, screen navigation, report generation, etc. both separately and concurrently.

3. Are there redundant systems at different locations? If yes, where?

4. Where are the live data and any backups stored?

Interfaces

1. If we want to interface to a third-party system which you do not have a standard interface for, describe the architecture/tools/process we would need to follow to complete the interface.

Product Deployment

1. What is the migration process in upgrading to new versions and how does the upgrade process affect customization?

Security

1. What virus detection/scanning mechanisms are in place?

2. Have there been any significant company security breaches in the last five years? How do you handle security breaches?

3. Can we restrict users from viewing and/or editing at the field level?

4. Can we manage the system access without relying on the vendor?

5. Does your system have the ability to set up "mass" security profiles by employee group?

6. What are the user password requirements (length, complexity)?

7. Do you two factor authentication?

8. Do you use biometrics for smart devices?

Application Security

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

2. How are the users and security roles administered?

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

4. Can users have more than one security profile?

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

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

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

Human Resources

General

1. How do you handle system upgrades? Are upgrades included in the basic agreement or are additional fees assessed?

2. Who has responsibility for maintaining customization changes?

3. Describe the integration between the payroll, time and attendance, and human resources modules.

4. How much history can be maintained in your system and is the amount consistent across modules/applications? Does this require archiving records?

5. Does the system have data archiving capabilities?

6. Can the system use email to communicate with employees or administrators for the purpose of workflows?

7. Does your system have the ability to create and populate Custom Fields?

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

9. Does your system have the ability to do electronic signatures on Personnel documents between employees across the organization (Evaluations, personnel action forms, new hire/termination documents, etc.)?

Organization Information

1. Can we configure organizational structures by Division, Location, Functional Groups (i.e., Corporate = finance, accounting, legal, human resources making up one group), Departments?

2. Do we have the ability to run an organizational report and view it in an organizational chart format?

3. Does the system provide an employee summary view to display fields such as date of hire, job title, job code, reports to, salary, department, company code?

4. Does your system provide an employee filter or inquiry ability to sort employees?

5. Does your system have the ability for managers to update organization information online, such as reporting relationship or location, with approval?

6. Can your system support employees that hold multiple positions with different department and pay rates?

Talent Acquisition

Recruitment

1. Provide a recruiting solution overview.

2. Do you own your recruiting software solution or is it provided through a partnership arrangement?

3. How are candidates managed during the recruiting process?

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

5. Can the job posting be customized?

6. Can we easily create customized questions for individual requisitions in addition to the standard application?

7. Describe the ability for managers to directly view, comment and respond to applicants.

8. Describe the ability to search applicant database based on key words or criteria.

9. Can we track human resources or manager notes in the system?

10. Explain the ability for candidates to complete an employment profile.

11. Does it allow an applicant to be a candidate for multiple postings without having to reapply for each position?

12. Does the system allow candidates to upload multiple documents or scanned images during application process, such as resume, cover letter or veteran's preference form?

13. Does it allow an applicant to update a previously submitted application to apply for future openings?

14. Does your solution allow for an automatic email response to candidates? If so, please describe the communication types included in the solution. Are these configurable?

15. Describe the ability to forward information from recruitment into HRIS system so data does not need to be reentered.

Onboarding

1. Describe your onboarding solution.

2. Explain the ability to create a new hire workflow that enables human resources to notify, assign tasks, or collect data from multiple parties in the event of a new hire.

3. Can we enter new hire data before start date or start of payroll period (effective dating)?

4. Does the system allow new hires to enter information via a web portal prior to start date?

5. Describe the systems on-line I-9 tracking system.

Employee Termination

1. Describe your employer configurable termination workflow and how it supports termination of employees and independent contractors (if this data can also be stored).

2. Can the system automatically cancel specified employee benefits upon termination?

3. Describe your system's ability to create a termination workflow that enables human resources to notify, assign tasks, or collect data from multiple parties in the event of a termination. For example, to notify and record that computer access has been disabled.

4. Does the system provide turnover analysis reports? Explain the drill down capability.

5. Does your system have the ability to track termination by reason, date, rehire eligibility and COBRA election?

6. Can we archive terminated employee information indefinitely?

Benefits

1. Does your system handle benefits administration?

2. Describe the integration between benefits and payroll.

3. Explain how your system facilitates reporting to third-party vendors.

4. Describe the system capabilities for online benefits enrollment.

5. Describe the life events that come standard along with those that require configuration.

6. How would the system assist in reconciling insurance bills or contributions due to third party administrators?

7. Can benefit plans be set up so only a specific group of employees are eligible for them?

8. Can benefit cost changes be future dated for a future year within the current year?

9. Does the system have the ability to handle calendar/fiscal benefit plans?

10. Are premiums automatically updated for age and salary benefit calculations?

11. Are insurance amounts automatically adjusted when a salary increases?

12. Can you automatically enroll a certain group of people in a benefit plan?

13. Do Employee Benefit Statements include the company's cost of benefits?

14. How does the system accommodate benefits requiring evidence of insurability?

15. Does the system notify administrator when new hire enrollment is complete or when changes have been made?

16. In addition to enrollment and life events does employee self-service include the following?

- Viewing employee's current plans and covered dependents
- Viewing related information such as summary plan documents
- Viewing plan comparisons
- Links to carrier website
- Displays only the benefit plans for which the employee is eligible

17. Can employees manage dependent data in the system?

18. Does the system automatically remind employees to enroll if they have not completed the enrollment process by a specified date?

Affordable Care Act

1. How has the system been upgraded to handle all of the benefit changes due to the Affordable Care Act?

2. Describe your ability to forecast costs.

3. Does your system allow for hours tracking hours per pay period for both Initial and Standard measurement periods?

4. Can your system simultaneously measure an employee in both a Standard and Initial measurement period?

5. How does your system capture declination or insurance covered dates?

6. Describe how your system takes into account the Standard Measurement Period, Admin Period and Stability period each and every year? Is it automated?

7. Describe how the system utilizes "Safe Harbor" rules.

Talent Management

Compensation Management

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

2. Can we perform online compensation modeling?

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

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

5. Please describe how customers can link performance to compensation?

6. Explain how your system creates and retains salary history?

7. What types of reports are available for compensation?

8. Does your system validate minimum and maximum salary (of grade) when pay is changed and provides a warning message as needed?

9. Explain how the same job can have different salary ranges based on job location (to account for geographical differences in pay).

10. Does it store compensation range information as part of the employee record?

11. Does your system allow employees to access current compensation and compensation range/plan information via self-service?

Performance Management

1. Describe your performance management capabilities.

2. Do we have the ability to have multiple review forms per type of employee and automatically link manager to the correct form?

3. Is there a configurable workflow to do online performance review completion and submission seeking the employee's input first and then the manager's flowing upward for additional approvals in the reporting line and then onto HR and payroll for processing?

4. Are both self and manager assessments available?

5. Describe the ability to complete 360 reviews.

6. Can cascading goals be set?

7. Can the manager and employee update goals and objectives?

8. Can we create, edit, update and delete company-wide competency models?

9. Ability to track performance reviews, both due date and date completed.

10. Can the system automatically notify a manager when a performance review is due and overdue?

Talent Activation

1. How is your solution providing a better employee engagement and leadership development strategy than current methods?

2. What assessment tools does your solution offer?

3. Does your solution provide coaching to managers based on feedback?

4. Does your solution support 360 feedback?

5. What is your consulting and change management approach for facilitating engagement action planning?

6. Does your solution offer education and coaching services?

7. What are your approaches and toolsets for real-time pulse surveys?

Employee Self Service

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

2. Is this application integrated with the main HRIS application?

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

4. Does the system allow employees to change their own passwords?

5. Can employees' access company-level documentation?

6. How does your self-service solution accommodate policy acknowledgement?

7. How do employees view and access benefits information?

8. How do you define activities or events in your self-service solution?

9. What support would be required from our IT department?

10. How do you assist organizations in rolling out self-service? What training would be available to employees and/or managers?

11. To what degree can your self-service interface be customized?

Manager Self Service

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

2. Describe how managers are limited to information for only their direct reports.

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

4. Are managers able to run reports from self-service? How is it performed?

5. Ability to customize information, reports and workflows offered through self-service to different employee groups.

Document Management

1. Describe your Document Management capabilities?

2. What formats are accepted/recognized?

3. Can the documents be linked to more than one workflow?

4. How can documents be searched?

5. Describe the security to restrict employees from seeing certain documents.

Payroll

1. Summarize the payroll services you provide that would no longer need to be handled in-house.

2. Does your organization specifically handle deposit and filing of taxes and processing of W-2's or is it handled by a 3rd party?

3. Does your organization file state unemployment insurance reports and quarterly tax returns (941)? Is this included in the base service or an additional fee?

4. Is this application integrated with your main HRIS product?

5. What methods for data entry exist in your solution?

6. How do you handle employees with multiple rates of pay who may cross multiple departments/cost center assignments?

7. Describe the check voiding process.

8. How do you handle imputed income?

9. Do you handle unlimited direct deposits? If no, what is the maximum?

10. Do you support payroll accumulators by: Federal reporting month-to-date, Quarter to date, Fiscal year to date, and Federal reporting year to date?

11. Do you associate end dates for deductions and automatically stop the deduction?

12. How does your system accommodate additional payroll processing for items like bonuses, expenses, commissions, etc.?

13. Explain what happens when an employee does not have enough net pay to cover his deductions for the pay period

14. Describe the vendor responsibilities for the yearend and year begin processes.

15. Describe the expectations for the client for yearend and year begin processes.

16. Describe the manual check process.

17. Can administrators immediately view the complete zero-to-net impact of changes made to time records?

18. Do you provide configurable, in-application audit reports for identifying potential issues? Please explain.

19. Are unlimited number of earning and deduction definitions supported?

20. How does your solution handle garnishment calculation, prioritization and pay?

21. Please describe the process to void and reissue checks.

22. How do you handle special taxation rules for non-cash benefits such as long-term disability, group life insurance and community center memberships?

23. Does the solution have the ability to exclude pay types from eligible earnings for calculations?

Tax

1. Do you provide full tax filing processes?

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

3. Do you support one-time additional tax amounts and/or overrides?

4. Do you provide all relevant end of year payroll processing reports including W-2, 941, 1099s State, SUI?

5. How do you handle inquiries, discrepancies, and resolution for federal, state, and local tax inquiries?

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

7. How do you distinguish yourself from the competition in the area of tax processing?

General Ledger Interface

1. Describe your general ledger interface process.

2. 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.

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

4. Can data be exported to excel for editing capabilities?

5. Can we use descriptions in the General Ledger? Is there a limitation to length, character segments of General Ledger number?

6. Do we have the ability to create new G/L codes and mappings internally?

8. Does it accommodate exceptions to the GL mapping down to the employee level?

9. Please describe the GL entries for the accrual of payroll at month-end.

10. Will adjustments be automatically posted to GL? Explain.

Time And Attendance

General

1. Describe your time and attendance capabilities.

2. How do you minimize downtime for 24/7 operations?

3. How does the system enforce access control?

4. Is data viewed and available in real time?

5. Who can define access control rules?

6. Describe the approval process within your application?

7. Can the employee and approver check status of the time records (processed or not processed) for a specific time period?

8. Can the employee and approver review information from the time records in detail and in summary form (as part of the core package)?

9. Are employees able to access prior period information?

10. Describe automatic email notifications, alerts, reminders, and exception reporting.

11. Is an audit trail of any edits kept?

12. How does synchronization of data work across multiple sites/locations?

13. What are the standard methods used to capture employee hours?

14. Describe how your application can support Labor Distribution.

15. What are your procedures for archiving or retaining historical information?

16. Can the system distinguish between an employee and a temporary employee?

17. Does the application allow for multiple methods for calculation of overtime and double-time (i.e. premium time) based on employee type?

18. How does your system handle predefined Holidays?

19. Does the application have the capability to automatically remind employees and managers to sign and/or approve time-off/timecards requests?

SCHEDULES

1. Provide an overview of the system's scheduling functions (e.g., building schedules, templates, scheduling vacations, and default holidays).

2. Can an employee’s timecard be prepopulated from their schedule?

3. Explain the ability to pre-populate time with approved time off, leaves and holidays.

4. Can supervisors view schedules within their workgroup and by employee?

5. Can our supervisors make changes either to the schedule or reported time?

APPROVALS

1. Describe the time-card approval process within your application.

2. Can an employee make edits to their time sheet prior to submission for approval?

3. Does it allow for multiple individuals to approve time electronically?

OVERTIME AND PAY RULES

1. Describe how your system supports wages & various overtime rules

2. Explain the ability to flag hours scheduled or entered in excess of 40 when an employee is working multiple positions.

3. Does the system have the ability to flag supervisors when employees are approaching OT?

4. Does your system have the ability to calculate weighted average OT?

5. Can the system handle OT when it is both paid for hours in excess of scheduled hours for the day or hours over 40 in a week?

Time Off/Leaves of Absence

1. Please explain your time off tracking capabilities

2. Explain how your solution handles time off/vacation request (e.g., request form, validation of PTO balance, and rules to prevent overdraw).

3. How does your system track scheduled leave versus leave actually taken? Is this information available for review?

4. Does the application automatically start tracking accrual hours for new hires and employees with status changes based on rules previously created?

5. Do we have the ability to assign accrual criteria (or tables) to individual or groups of employees?

6. Will our employees and managers be able to directly view PTO amounts earned and taken, and the dates on which the accruals were used? Please explain.

7. Does approved time off automatically pre-populated in time and attendance?

8. Can your system accommodate FMLA tracking?

9. Will we have the ability to do multiple coding for leave hours? For example, time off could be coded both as PTO and FMLA?

10. Does the solution have the ability to create an employee time off/leave calendar by group, division or department? Is this available through self-service?

Reporting

1. Please describe your reporting functionality.

2. Describe how your report writer can filter data in multiple ways using any field? Can data be sorted by both financial parameters (business unit, budget code) and human resources parameters (organization level, job code)?

3. How many standard reports does your system have available?

4. Describe the system's ability to format reports. Does the data have to be exported to a Microsoft Office product before formatting can occur?

5. Explain your ability to import and export data from Microsoft Word, Excel and Access.

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

7. Explain the system's ability to run reports with historical data.

8. Does your system provide required governmental reports such as EEO, Veteran status, Affordable Care Act, etc.?

9. Does the system have the ability to handle consolidated reporting across companies/organizations?

10. Does the system provide an ad-hoc report writer?

Business Analytics

1. Describe your capability to support data analytics dashboards.

2. Does your software support customizable dashboards?

3. Is Data Analytics/Dashboards/Business Intelligence integrated or is it sold in a separate module?

4. Is access to analytic dashboards controlled by role-based security?

5. Is all reporting and analytics data is real-time across all functional areas?

6. Reporting and analytics data visibility respects the configured security model.

Implementation

1. Provide an overview of your implementation methodology phases.

2. Describe the typical implementation team and their roles and experience.

3. What differentiates your implementation approach from other vendors?

4. How many parallel runs do you perform?

5. Does the system allow for the importing of initial data?

Account Management

1. What is your customer service model? Will we have one point of contact for our questions and system problems?

2. Please describe your service delivery team.

3. What written documentation is provided with your service? What type of information is available on your website?

4. How is the quality of your support center monitored? Describe any formal quality programs you have in place. Review any available quality or performance data.

5. What is the standard service level response for support requests?

6. Do you facilitate a user group? How does the user group function?

7. Do you offer consulting services outside the standard services?

8. Describe how you offer best practices and assist with process improvement.

Training

1. What types of training do you offer customers?

2. What training materials do you provide?

3. What training options are available above and beyond basic training?

4. What type of technical training do you provide to ensure that your clients remain abreast of regulatory changes with regard to payroll?