First Choice
COMMUNITY HEALTHCARE

Payroll/Human Resources Software Vendor Selection

Request for Proposals (RFP)

April 22, 2020

RFP #20_01

Proposals Due: May 22, 2020, 4:00 PM MDT

First Choice Community Healthcare, Inc.
2001 N. Centro Familiar SW
Albuquerque, NM 87105

1. Introduction

First Choice Community Healthcare, Inc. (FCCH) is seeking proposals for payroll and human resources management software. FCCH will be the sole judge as to which proposal best suits the company's requirements. This Request for Proposals (RFP) is to invite interested and qualified vendors to submit proposals in accordance with the instructions provided where the successful Proposer will be invited to enter into a contractual relationship with FCCH for the services outlined in this RFP. FCCH is willing to consider multiple systems that can be integrated; specifically, a payroll system that will be integrated and complement a benefits administration system, both of which will integrate with an onboarding and eligibility management system.

The decision to award a contract to a single vendor or multiple vendors will be based on the following factors:

Factor	Points
Price	15
Implementation & on-going support	15
Functional fit with organization	15
Scalability and flexibility	10
Ease of conversion and migration	15
Ease of use/customer experience including customer service	15
References	15
TOTAL BASE POINTS POSSIBLE	100

Additional Points	
Single application for all in-scope components	10
Experience with Federally Qualified Healthcare Centers	10

FCCH reserves the right to accept or reject in part or in entirety any or all proposals received as a result of this request. Any decisions by FCCH shall be final and conclusive. The terms "Proposer" and "Vendor" are used interchangeably throughout this RFP.

Proposers will not be reimbursed for costs that they incur in preparing their RFP responses.

2. Background

FCCH is a community health care system providing primary medical, dental, and behavioral health care services to the under-served populations of the Middle Rio Grande Valley of central New Mexico. FCCH has been in existence since 1972. The communities we serve lie within the Greater Albuquerque Metropolitan Statistical Area and include Bernalillo and southern Santa Fe and Valencia counties. Because of relatively few other health care providers, our service area also extends into adjacent Torrance, Socorro, and Sandoval counties. FCCH employs a staff of 470(+/-) full and part time employees throughout eight health centers and one school-based health center. In 2019, we provided care to 52,655 individuals through 170,391 patient encounters. FCCH is a Health Center Program grantee under 42 U.S.C. 254b, and a deemed Public Health Service employer under 42 U.S.C. 233(g)-(n). We are accredited by The Joint Commission.

3. Proposal Submissions

All submissions become property of FCCH and will not be returned. All conditions contained in this RFP are considered accepted by the vendor in any proposal submitted. The accepted proposal will be included as an attachment to the agreement with FCCH. The successful vendor will be required to execute a standard FCCH Professional Services Contract, a copy of which is included with this RFP.

Vendors shall submit a cover letter with their proposal, on company letterhead, which must be signed by a person authorized to bind the company to the proposal specifications and pricing. The cover letter must include the following statement:

By signing this proposal, the undersigned hereby acknowledges that they are authorized and duly bound

to execute this document on behalf of the company and that his/her signature is binding on the company.

4. Questions & Answers

Any questions must be submitted in writing to RFP@fcch.com, no later than April 30, 2020, and must include "Questions – RFP #20_01" in the subject line. Answers will be posted on the FCCH website where this RFP is posted (FCCH.com) according to the timeline that follows. It is the sole responsibility of the proposer to visit the website throughout the proposal development process for any changes to the RFP documents issued by FCCH. Proposers agree that FCCH shall not be liable for any claim based on the proposer's failure to monitor the website for changes.

FCCH may amend, in whole or in part, any terms or provisions of this RFP prior to the closing time.

5. RFP Timetable

Event	Date	Time
RFP Issued	April 22, 2020	n/a
Written questions from proposers	April 30, 2020	5:00 PM
Written answers (no later than)	May 8, 2020	5:00 PM
Proposal submission deadline	May 22, 2020	4:00 PM
Semi-finalists notification*	May 29, 2020	n/a
Initial demonstrations*	Week of June 8, 2020	n/a
Finalist(s) notification*	June 17, 2020	n/a
On-site demonstration*	Week of June 22, 2020	n/a
Contract Awarded*	July 1, 2020	n/a
Implemented no later than	August 1, 2020	n/a

**Dates are tentative and subject to change*

6. Proposal Submission Format

Proposers shall submit an electronic copy of their proposal, in PDF format, to RFP@fcch.com and shall include "PROPOSAL to RFP #20_01" in the subject line of the e-mail message.

A. Vendor Overview

Company Information

1. **Provide a brief overview of your company including:**
   - Year founded
   - Number of employees
   - Primary business focus
   - Ownership structure (public or private)
   - Leadership Team
   - Awards and Recognitions

2. **Please describe your customer base and target market. What is the average size of your customers?**

3. **Are there any outstanding lawsuits against your company? If so, please explain.**

4. **Please describe your company vision for the next 3 years.**

Proposed Solution   *3*

5. **Please specify if you are proposing a single system or if you are proposing a system that will address only payroll, benefits administration or onboarding and eligibility management. Please specify with what systems your proposed system interfaces and how.**

6. **Provide a high-level technical architecture graphic of the proposed solution. What differentiates your product from others in the market place?**

7. **Please indicate whether the in-scope modules were developed in-house, or if they were acquired. If they were acquired, who are your partners?**

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

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

User Experience

10. **How is your application accessed (i.e. web browser, mobile, some other application)? Please list all available platforms.**

11. **Please provide an overview of how your user experience helps drive user adoption, even among non-technical users. What are any unique aspects?**

B. FCCH Requirements

The following section lists the detailed functional requirements FCCH is seeking for the various modules in scope.

Please answer the questions at the bottom of this page and use the following matrix as a key for responding to the functionality tables in the RFP.

Response Code	Description
Y - Existing	Feature is delivered as standard functionality in the proposed version of the software and can be demonstrated by the Vendor.
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	Requirement cannot be met.

Human Resources

Please provide a brief overview of your solution's human resources function.

a) *Administration*

1. **Does the system allow multiple administrators?**
2. **What is the process of providing a new user with log-in information?**
3. **What audits or reports are available for system administrators to review access and activity?**
4. **Describe or illustrate the employee profile available to managers and employee?**

Requirement	Code	Comments
All FCCH specific requirements can be supported through configuration – not customization.		
Allows an administrator to easily lockout, inactivate, and reactivate user accounts.		
Uses role-based security for determining user privileges throughout the application.		
Allows for the configuration of an unlimited number of security profiles using role security.		
Provides configurable rules for specifying global password policy including: • Require strong password using combination of alpha, numeric, and special character combination of upper and lower case; • Password expiration based on configurable number of days; • Requires employee to reset password on 1st login; • Lockout user after configurable number of maximum login attempts; • Ability to specify minimum amount of time before a previously used password can be reused.		
Provides tools for administrators to easily reset passwords.		
Enables employees to change their password through self-service.		

Requirement	Code	Comments
All HR records contain an effective date and all entries identify the individual making the entry.		
Maintains employee demographic data for all employee-related details in a single system of record including, but not limited to: • Birth date; • Employee number; • Gender; • Hire date; • Termination date; • Re-hire date; • Contact information; • Address; • Marital status; • Dependents; • Emergency contacts; • Ethnicity; • Veteran status; • Disabled status; • Social Security Number/Social Insurance Number; • Citizenship; • Language; and • Tax definitions.		
Ability to maintain multiple funding sources per employee per job and/or work assignment.		
Maintain employee training/certification data.		
Maintains data for all job-related details including but not limited to: • Pay grade • FLSA status • EEO code • Classification/Job Title • Position Type • Executive/Officer • Full Time Equivalent		

Requirement	Code	Comments
Tracks and reports on disciplinary actions.		
Allows for employees to be seamlessly transferred between departments, jobs or work location.		
Provides tool for creating mass updates to multiple employee records.		
Supports an unlimited number of client defined fields for employee record keeping.		
Supports future dated and retroactive changes to employee records using effective dating.		
For all changes to employee records, tracks what was changed, who made the change, and when the change was made.		
Employee audit information is visible both in application and through a standard report.		

b) Organizational Structure

How are employee-manager relationships defined and maintained?

Requirement	Code	Comments
Provides for FCCH-defined organizational levels.		
Allows FCCH to easily manage the organizational hierarchy including the ability to: • Add new locations; • Close locations; and • Perform realignments.		
Supports FCCH management structures.		
Supports direct employee-to-manager reporting relationships.		
Supports management structures derived by FCCH hierarchy and direct employee-to-manager reporting relationships in the same instance.		

Requirement	Code	Comments
Supports an unlimited number of FCCH locations.		
Supports an unlimited number of departments.		
Supports an unlimited number of jobs.		
Supports inclusion of students and contractors in workforce definitions and tracking.		
Uses effective dating for all changes made to the organizational hierarchy.		
Allows users to create their own organizational structure, including departments, while attaching taxes, GL codes and earnings to the associated departments.		

c) Self-Service

Please provide an overview of your self-service functionality. Does this span across all modules/applications?

Please provide an overview of your mobile capabilities.

Requirement	Code	Comments
Employees can access links that launch uploaded documents, email, or hyperlinks.		
Provides configurable forms and workflows for employees to:		
• Add/update address		
• Add/update phone number		
• Add/update email address		
• Add/update emergency contacts		
•		
Employees must specify an effective date for all changes to their personal information.		
Employees can list multiple address types.		

Requirement	Code	Comments
Employees can have only one primary residence at a time.		
Employees can list multiple phone numbers and email addresses.		
FCCH can configure marital status types.		
FCCH can configure which HR forms employees have access to by role.		
Employees can update their password.		
Delegation of features uses effective dating.		
Application provides built-in messaging capabilities to facilitate communication across the organization. This includes the ability to: • Review messages; • Send new messages; • Reply to messages; • Broadcast messages to multiple users; and • Forward messages.		
Application allows users to create distribution lists for messaging based on HR and organizational properties (e.g. all full-time employees at a specific site).		
Messaging distribution lists are automatically updated as employees' HR records are updated.		
Provides built-in alerting capabilities. ***If so, please describe.***		
Managers receive alerts of employee requests.		
Managers can choose to receive alerts by SMS or email.		
Managers can act on employee requests directly from email.		

d) *Workflow*

Describe the process for workflow set up.

Describe any predefined workflows that are provided. What visibility do users have into active workflows?

Describe how administrators can intervene in active workflows.

Requirement	Code	Comments
Application offers built-in and configurable workflows.		
FCCH can configure an unlimited number of workflows for updating employee HR information.		
Application provides a user-friendly tool for configuring workflows without the need for vendor support or services.		
Forms submitted through workflow and routed to the appropriate approver(s).		
Automatically sends email notice to approver regarding the request.		
Automatically sends email notice to initiator regarding approval.		
Workflow engine can accommodate unlimited levels of approval.		
Workflow engine can support conditional workflows (e.g. salary increase less than 5% does not require approval but salary increase over 5% requires approval from HR).		
Workflow engine can send different notifications to various users at any stage during the workflow (e.g. notify IT that new hire requires laptop on approval).		
Workflows for the same type of data can differ by role (e.g. new hire submitted by manager requires approval but new hire submitted by administrator does not require approval).		
Data updated across all functional areas upon approval (i.e. does not require interface to run to update payroll).		
Administrators can view/cancel pending workflow transactions.		
Administrators can view a complete history of completed and in process workflows.		

e) Hiring

How is an employee hired within the system?

Requirement	Code	Comments
Provides configurable approval workflow for hiring candidates.		
Automatically creates user accounts for new hires.		
Employee data is available throughout entire application upon approval with no need for duplicate data entry.		
Automatically generates employee numbers for new hires based on FCCH defined numbering rules.		
Ability to enter new hire with a future dated start-date.		

f) Termination

How is an employee terminated within the system? What automation does the solution provide?

Once terminated, how is the employee's HR record maintained?

Requirement	Code	Comments
Allows administrator to update terminated employees' records (i.e., for address changes).		
Allows for configurable termination workflows.		
Users can select from a list of configurable reasons for termination.		
Users can view terminated employees' HR records.		
User accounts can be automatically disabled upon termination.		
Identifies all systems and applications to which employee had access and notifies appropriate departments of employee's termination.		
Terminates all benefit and leave balances to zero to avoid any errors if employee returns.		

Payroll

a) Payroll Processing

Please provide an overview of your payroll functionality.

How does your solution streamline the payroll process for administrators?

How does payroll interface with an outside payroll processing vendor?

Requirement	Code	Comments
Ensures payroll accurately calculates all earnings, deductions and taxes.		
Single application for payroll and time and attendance, but can run payroll without time and attendance. (Able to run time and attendance for some employee groups, but not all).		
Calculates zero-to-gross and gross-to-net pay using the same rule engine.		
Application does not require time data to be transmitted into payroll using an interface.		
Administrators can immediately view the complete zero-to-net impact of changes made to time records.		
Administrators can view a preview of their entire payroll at any point during the pay cycle.		
Provides configurable, in-application audit reports for identifying potential issues. *If so,* p*lease explain.*		
Audit reports are updated as adjustments/corrections are made to time and attendance records, HR data, or payroll without the need to wait for interfaces or regenerate reports.		
Allows for manual checks to be printed onsite and/or make direct deposits based on client's requirements.		
Adjustments can be imported directly into the application from an XLS or CSV file.		

Requirement	Code	Comments
System does not require adjustments be entered in batches.		
System can calculate pay for a single employee without the need to recalculate the entire payroll.		
Supports retro pay calculations. **If so, please describe.**		
Voids payroll checks/cancels ACH payments.		
Allows for payroll adjustments to correct taxes to be posted to current or prior quarter.		
Supports an unlimited number of employees in a single pay group for payroll processing.		
FCCH can perform additional (off-cycle) pay runs at no additional cost.		
Please specify the average amount of time your application requires to calculate payroll per employee.		
Supports exception based/auto-pay for salaried or fixed hourly employees.		
Supports mid-pay period adjustments to employee salary or hourly rate.		
Supports generation of pay checks and/or direct deposit.		
Handles direct deposit to multiple financial institutions.		
Creates an ACH file for direct deposit.		
Supports Positive Pay.		
Vendor provides year end services. **If so, please describe.**		

b) *Earnings*

Requirement	Code	Comments
Supports an unlimited number of earning definitions.		
FCCH can configure earning codes without the need for vendor support/services.		
FCCH can specify taxability for each earning code.		
Supports the calculation of taxable benefits.		
Supports the reporting, tracking and calculation of non-taxable reimbursements.		
Tracks YTD, QTD, MTD and last payroll amounts by earning type, by employee.		
Handles employees with multiple rates of pay.		
Allows FCCH to set up limits/goals by earning definition.		
Allows for payment of various stipends, continuing education payments and reimbursements through the payroll system.		

c) *Deductions*

Requirement	Code	Comments
Supports an unlimited number of deduction definitions.		
FCCH can configure deduction codes without the need for vendor support/services.		
Supports the calculation of pre-tax and post-tax deductions.		
Tracks YTD, QTD, MTD and last payroll amounts by deduction type, by employee.		
Allows clients to set-up limits/goals by deduction definition.		
Allows deduction amount to be set at the pay group level and/or at the individual employee level.		

Requirement	Code	Comments	Code	Code
Allows deduction frequency to be set up at the pay group level and/or at the individual employee level.				
Allows for an additional check to be exempt from all deductions except for taxes (i.e., PTO buyouts).				
Provides an expression builder for creating company specific deduction calculations.				
Supports start and stop dates for deductions (effective dating).				
Deduction cost uses effective dating.				
Allows FCCH defined prioritization of deductions.				
Deduction amounts can be adjusted or overridden for an employee for a particular pay run.				
Supports calculation of garnishments.				
Calculates garnishments based on various state and federal calculation rulings.				
Provides logic to properly calculate multiple garnishments according to levels of authority and rules of pay				

d) *Taxes*

Describe the tax resources and services provided to your customers.

Do you provide full tax filing services to include Federal filings, Unemployment, Workers' Compensation, Paid Family and Medical Leave, and amendments? Explain.

How are tax updates handled?

Requirement	Code	Comments
Social Security and Medicare can be separated so that Social Security can be turned off for specific employees or groups.		
Provides for all federal, state and local taxing jurisdictions for the United States.		
Supports the outsourcing of payroll tax deposits and filings.		

Requirement	Code	Comments
Provides all relevant end of year payroll processing reports including W-2, 941, 1099s, State, SUI, and worksite reporting.		
Vendor can provide a print service for W-2s.		
Maintains tax rates within the proposed system and provides automatic updates without the need for FCCH intervention		
Tracks YTD, QTD, and MTD taxes by tax type, by employee, by legal entity.		
Supports one-time additional tax amounts and/or overrides.		
Accommodates separate tax-exempt controls for federal, state and local taxes.		
Provides additional withholding fields for federal, state, and local taxes.		
Allows for earnings to be taxed at different tax rates (e.g. regular and supplemental) on the same check.		

e) Self-Service

Please describe what pay information employees are able to access within the solution.

Does your solution support total compensation statements?

Requirement	Code	Comments
Employees can provide add/update direct deposit information.		
Employees can list multiple accounts for direct deposit.		
Employees can specify percentage of pay to be allocated to each direct deposit account.		

Requirement	Code	Comments
Employees can complete Federal and State W-4s online and submit for approval according to configurable workflow.		
Employees can view online earning statement.		
Online earning statement displays both current and YTD values broken out by earning definition, deduction definition and tax definition.		
Employees can print earning statement directly from the application.		
Employees can access unlimited number of historical earning statements.		
Application provides online access to W-2s.		
Employees can print W-2s directly from the application.		
Employees can access unlimited number of historical W-2s.		

General Ledger

Describe your general ledger process (systems with which your system integrates)

Requirement	Code	Comments
Maps GL account numbers within the application.		
GL setup tables are accessible by users to change at any time.		
Accommodates exceptions to the GL mapping down to the employee level.		
Creates GL accruals.		
Adjustments are automatically posted to GL.		
Supports unlimited length for GL codes (1-XXX-XXX-XXXX-XXXX).		
GL segments can be broken down into independent fields.		
Creates export file for GL import.		
GL segments can be added by client.		

Benefits

a) Benefit Administration

Please provide an overview of your benefits administration functionality.

Requirement	Code	Comments
Allows for electronic file feeds and the systems with which your system can communicate.		
Benefit plans are effective dated.		
Employee benefit enrollments are effective dated.		
Benefit plan rates are effective dated.		
Allows for configuration of eligibility rules based on employee demographic data and employee information.		
Allows for FCCH to configure reusable eligibility rules.		
Provides configuration options for determining benefit plan waiting periods (i.e. 1st of month following one full month of employment).		
Provides configuration options for determining when to end coverage if employee is no longer eligible and notifies when employee is approaching Medicare enrollment age.		
Allows unlimited number of dependents to be listed on employee records for each option offered.		
Specifies maximum age of dependents for each option offered.		
Multiple benefit plans and options can use the same payroll deduction.		
Calculates imputed income.		
Supports multiple types of life insurance, long term disability, short-term disability, and voluntary life coverage		
Supports an unlimited number of benefit plans and options.		
Supports flexible spending accounts (FSA).		
Notification that 1095C was issued by appropriate benefit administrator.		

Requirement	Code	Comments
Supports various Employer Shared Responsibility (ESR) benefits including compensation plans such as 403(B).		
Enforces employee and employer contribution limits for deferred compensation plans.		
Provides configurable life events to automatically trigger re-enrollment and automatically triggers "benefit catch up" contributions for eligible employees.		
Includes an expression builder for determining coverage amount (e.g. life insurance covers the greater of $50,000 or 1X annual salary up to a maximum of $120,000).		
Provides a user-friendly interface for configuring benefit plans and enrollments without the need for vendor support/services.		
Provides a single screen that shows employee benefits data at a glance with drill down capabilities.		
Supports unlimited number of carrier feeds.		
Can manage and track continuing education benefits including type of benefits and use by employee type (i.e. clinical, ancillary, administrative, etc).		

b) Open Enrollment

How do employees perform open enrollments?

Requirement	Code	Comments
Provides intuitive, online self-service tool for employees to perform enrollments that can be accessed from home.		
Employees can view current benefits and related information during enrollment.		
FCCH can specify a list of profile forms to be updated during enrollment (e.g., address, marital status, dependents, conflict of interest).		
Employee can only see options for which they are eligible.		
Employee can choose to keep existing elections with no changes if eligible.		

Requirement	Code	Comments
Employee eligibility is dynamically updated based on information entered on profile forms during enrollment (i.e., if employee changes marital status from married to single during enrollment, employee does not see any benefit options that require the employee to be married).		
Employee can select to waive or decline benefits.		
FCCH can configure whether or not to hide or display employer cost per election set.		
Employee can view total per pay period and annual cost of elections as they make their selection.		
Employee enrollments can be made subject to a configurable approval workflow.		
FCCH can use rich text editing options to configure text to appear throughout the enrollment functionality.		
FCCH can provide hyperlink to benefit provider website(s).		

Reporting and Analytics

a) Standard Reports

Provide an overview of the reporting tools and how they are integrated with HR and payroll.

Requirement	Code	Comments
Provides standard compliance reports for EEO and Vets-100 reporting.		
Provides a library of standard reports across functional areas.		
Standard reports include parameters that allow users to control the report output.		
Users can continue to use the application while reports generate.		

Requirement	Code	Comments
Application performance is not impacted by report generation.		
Reports can be downloaded to users' PCs in XLS or PDF format.		
Reports can be generated on demand.		
Reports can be generated for the current period or a historical period.		
All reporting and analytics data are real-time across all functional areas.		
Reporting and analytics data visibility respects the configured security model.		

b) Custom Reports

How can users create custom reports? Is technical knowledge required?

Requirement	Code	Comments
System provides for custom reports based on client's unique fields through a built-in *ad-hoc* report writing tool.		
Ad-hoc reports can be created by any user – regardless of technical background.		
Ad-hoc reports can be saved for reuse and edited if needed.		

c) Dashboards and Analytics

Please provide an overview of your dashboards and analytics functionality. How can users create custom dashboards or analytics?

Requirement	Code	Comments
Provides in-application, configurable dashboards for viewing summary analytics.		
Users can access multiple configurable dashboards.		

Requirement	Code	Comments
Access to dashboards is controlled by role-based security.		
Analytics solution uses data from across the application to provide actionable insight to managers and administrators.		

Document Management

Please describe your document management capabilities.

Requirement	Code	Comments
Ability to store and manage documents for and about FCCH employees in a single system.		
Ability to remain compliant with Generally Accepted Privacy Principles.		
Provides access to a central repository of documents with flexible search options.		
Employees can upload and access their own documents at any time.		
Ability to specify acceptable file extensions (i.e. .jpg, .pdf, .doc), and set security permissions, that can be assigned to each user role.		
Employee documents are attached to the same record used to capture all employee information, providing a single source of data.		
System provides safe, virus-free storage of documents.		
HR department maintains PII (Personally Identifiable Information) compliance by identifying which documents contain sensitive information and applying enhanced security and access controls.		
There are no size limitations for documents.		

Workforce Management

a) Scheduling

Provide an overview of your application's scheduling functionality

Requirement	Code	Comments
Are schedules generated in the application compliant with all labor laws?		
Do clients have the ability to configure scheduling rules?		
Do clients have the ability to configure the severity of scheduling rules (i.e. warning vs. hard stop)?		
Can the application prevent managers from saving schedules with labor compliance violations?		
How does the scheduling functionality enforce minimum/maximum limits for daily/weekly hours?		
Does the application have the ability to effectively schedule meal breaks?		
Does the application have a schedule optimization feature? *If so, please describe.*		
Describe managers' ability to edit schedules.		
How does the application notify managers of any errors or violations in the schedule?		
Describe how managers can keep a working copy of the schedule that is not visible to employees.		
Can the schedule be displayed to only show specific employees, pay types, departments, jobs, etc.?		
How does the system handle shifts, including on-call shifts?		
Can schedules be reported on?		

Requirement	Code	Comments
How do employees view their schedule?		
Can employees access their schedule from a mobile device?		
How are changes to the schedule communicated to employees?		
Does the application have auditing capabilities for changes made to the schedule?		
Are holidays and employees' time-off visually displayed on the schedule?		

b) Time and Attendance

Please provide an overview of your application's time and attendance functionality. How is time approved? What workflows and levels of approval are supported?

Requirement	Code	Comments
Application includes all Federal and State zero-to-gross pay rules out-of-the-box. ***Please explain.***		
Application supports configurable rules for defining complex FCCH-specific differentials and other premiums. ***Please describe.***		
Provides an intuitive interface for configuring gross pay rules without the need for vendor support/services.		
Gross pay rules are effective dated.		
Supports complex FLSA average overtime calculations when the pay period is not the same as the work week.		
Provides a comprehensive audit trail of all changes made to time records.		
Provides a user-friendly interface for reviewing employee time and attendance records.		

Requirement	Code	Comments
Managers/supervisors can view all their employees' time and attendance records on a single screen for the entire pay period without the need to scroll between days of the week and/or employee.		
Allows managers to easily identify and resolve exceptions. ***Please explain.***		
Provides filtering options to highlight specific time and attendance records (i.e. show only absences, or time cards with exceptions).		
Supports an unlimited number of pay codes and pay categories for tracking employee time.		
Supports multiple levels of labor allocation including: • Location; • Department; • Job; • Pay code; • Pay category; and • Project.		
Provides multiple options for employee time capture. ***If yes, please describe.***		
Only exempt employees can clock in and out using a mobile device.		
Provides configurable rounding rules.		
Allows managers to approve/authorize time cards.		
Supports employee sign-off of time cards including attestation to accuracy of time reported.		
Allows for multiple levels of approval for time data.		
Supports automatic approvals within FCCH rules/limits.		
Time records can be locked from further edits.		

c) *Paid Time Off/Leave Administration*

How does an employee request PTO? How do managers review/approve PTO requests?

Requirement	Code	Comments
Client can configure an unlimited number of paid and unpaid time off reasons.		
Supports complex rules for accruing leave balances. ***Please describe.***		
Provides configurable rules for how to carry over leave balances.		
Provides user friendly interface for submission and approval of time off. ***Please describe.***		
Provides users with onscreen alerting if a time off request exceeds the employee's available balance prior to submission.		
Supports configuration of blackout periods for time off requests.		
Provides configurable workflow for time off approvals.		
Tracks submission date of all requests for time off.		
Tracks approved date of all time-off requests.		
Approved time off requests are visually displayed on both employee and manager view of the schedule.		
Application can prevent managers from scheduling employees during approved time off.		
Employee balances are automatically deducted upon approval of time off.		
Timesheet is instantly and automatically updated upon approval of time off without the need for user intervention.		
Provides alerting capabilities to notify approver of pending time off requests.		
Provides workflow for cancelling pending and approved time off requests.		

Requirement	Code	Comments
Timesheet is instantly and automatically updated upon approval of time off without the need for user intervention.		
Provides alerting capabilities to notify approver of pending time off requests and allows non-exempt employees to make notes in their requests.		
Provides workflow for cancelling pending and approved time off requests.		

d) Self Service

Describe the mobile capabilities of the application specific to Time and Attendance functions, include which mobile devices are supported.

Requirement	Code	Comments
Provides employees with online access to current, past and future schedules.		
Schedules can be hidden from employees until they are posted or published.		
Employees can view approved time off requests on their schedule.		
Employees can view FCCH-authorized holidays on their schedule.		
Employees can be required to sign-off on timecards.		
Allows for multiple methods of entering time.		
Employees can view any changes made to their timecard.		
Employees can provide comments on timecards for managers to see.		
Employees can view all accrued balances.		
Employees can request time off. **Please describe.**		
Application displays all accrued balances while requesting time off.		
Application displays balances as of the dates of the request.		

Requirement	Code	Comments
Employees are provided with onscreen alerts if time off requests violate one or more configured rules (i.e. minimum balance or blackout dates).		
Employees can manage their availability online.		
Employees can view full attendance history online.		

Recruitment

a) Recruiting

Please provide an overview of your recruiting/applicant tracking functionality. How are jobs posted

internally and externally?

Describe how background checks are initiated How do applicants apply for a position?

Explain how EEO data is collected and maintained.

Describe mobile functionality for applicants, recruiters, and hiring managers.

Requirement	Code	Comments
Hiring Managers have access to submit job requisitions.		
Recruiters can submit job requisitions on hiring managers' behalf.		
Approval process can vary by job requisition (i.e. different approval process for new FTE vs. replacement).		
Job descriptions and details are pre-populated based on position.		
Provides a single point of contact for reviewing open job requisitions.		
Hiring managers have visibility into only their own open requisitions.		
Requisition details can be modified after creation.		
Integrates with background screening services.		
Provides consistent profile view for all candidates.		

Requirement	Code	Comments
Users can download original copy of a candidate's resume.		
Allows for an unlimited number of statuses for candidates (i.e. new, in-process, offered, declined, hired, etc.).		
Users can easily change candidate's status, either one-by-one or *en-masse*.		
Distinguishes between internal and external candidates.		
Integrates and communicates automatically with external recruitment sites.		
Job posting details can differ by external recruitment site.		
Allows for configurable job application templates.		
Allows administrators to define qualifying questions to automatically reject ineligible candidates.		
Provides candidate portals for both internal and external candidates.		
Applicants can find jobs using keyword or location-based searching.		
Applicants can receive notifications on new open positions?		
Provides multiple options for completing application including:		
• Upload resume/application directly		
• Manual entry		
• Specify which external recruitment sites are supported		
Applicants are immediately visible after submitting job application.		
Prevents applicants from applying for the same job twice.		
Provides recruiters with visibility into prior and current candidates.		

Requirement	Code	Comments
Provides intelligent search and filtering capabilities to find candidates.		
Ability to schedule candidates for interviews using Outlook.		
Provides configurable candidate email templates.		
Ability to define and manage candidate lists.		
Sorts candidates based on match with search criteria.		
Allows recruiters to move candidates across job requisitions.		
Candidates can manage their own profiles.		
Hiring/onboarding form is pre-populated with data captured during recruitment process.		
Supports customizable offer letter generation, approval, and tracking.		
Automatically creates employee record upon hiring.		
Automatically begins the onboarding process upon hiring.		
Retains submitted applicant material based on client retention schedules.		

b) Onboarding

Please provide an overview of your onboarding solution/functionality.

Requirement	Code	Comments
Can identify employee set-up requirements by position type and notify appropriate departments in advance of employee's start date.		
Ability for new hire to access the system and start the onboarding process prior to their first day.		
Ability to embed videos and welcome messages into the onboarding process.		

Requirement	Code	Comments
Assign an onboarding partner to the new hire.		
Ability to support a paperless onboarding process with W-4, I-9 documents, electronic signatures, and the generation of the on-going unique employee identification number?		
Ability to interface employee's I-9 to e-verify for United States citizenship.		
Ability to provide a system-generated checklist of activities that employees need to perform in order to complete the onboarding process (e.g. update marital status, update address, submit W4, etc.).		
Ability to perform onboarding activities in the mobile app.		
Ability to send employees a reminder if tasks are not completed in a timely manner.		
Ability for new hires to return and update or correct their information after the initial submission.		
Ability for onboarding employees to provide personal and professional details to support team socialization.		
Ability for HR and manager of 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, provisioning complete, etc.).		
Ability to vary the onboarding workflow and process according to multiple associated and position factors such as employee type, business unit, job function, etc.		
Ability to enroll in benefits during onboarding.		
Ability to monitor the overall status of the onboarding process, providing a clear indication of "new hire readiness."		
Ability to measure the performance of the onboarding process.		
Ability to survey employees about the onboarding process effectiveness.		

Performance Management

Please provide an overview of your performance management functionality.

How does your solution enable managers to effectively communicate with and provide feedback to their employees?

Requirement	Code	Comments
System provides a central dashboard view of all performance-related activities.		
Employees and managers can create, monitor, and update progress for goals in an intuitive user interface.		
System provides the ability to cascade organizational and team goals down to employee level, and align employee contributions to the success of those goals.		
Provides users with goal risk calculations status.		
Managers can delegate performance reviews to another manager.		
Configurable review forms, rating scales, and approval paths to mirror FCCH-specific HR processes including self-evaluations		
Provides eligibility process to create review process.		
Supports multiple review cycles.		
Configurable workflows to support goals and performance conversations.		
Inclusion of peers, colleagues and other leaders in the review and development process.		
Employees can access and update goals using the mobile app.		
Allows for the creation of action plans or disciplinary plans using FCCH forms to keep goals on track.		

Requirement	Code	Comments
Provides for goal approval process.		
System facilitates continuous, year-round feedback to aid in development.		
System provides the ability to identify and develop core strengths and proficiencies to drive business outcomes.		
Provides competency gap analysis.		
Comes with a standard library of core competencies.		

Compensation Management

Please describe your compensation management/salary planning functionality. How does

compensation management integrate with HR, payroll, and performance?

Requirement	Code	Comments
Ability to create comprehensive compensation plans with multiple budget types.		
Supports the creation and maintenance of salary grades/ranges.		
Supports the administration of stipends.		
Allows for productivity pay driven by performance results.		
Supports comparison metrics (market, geography, etc.).		
Provides configurable workflows and auditing for any changes.		
Real-time access to budget vs. spend data.		
Provides insight into gender pay equity.		
Provides a clear view of the entire organization with rule exceptions and required actions.		
Provides complete employee compensation history.		
Provides individual Total Compensation Statements.		
Effective dated updates to Payroll and HR.		

Employee Development/Succession Planning

Please describe your employee development/succession planning functionality. How do your succession planning capabilities integrate with recruiting and HR?

Requirement	Code	Comments
Supports the creation of career development plans/career pathing.		
Tracks and reports on clinical, professional, and other licenses and certifications and expiration dates and sends alerts to employee.		
Identifies top performing, high potential employees.		
Supports the creation of succession plans for key positions.		
Supports the creation of talent pools.		
Supports a single view for an employee or manager to see the full profile of an employee.		
Allows employees or managers to edit the profile to keep the information up to date.		
Supports definition of key positions, incumbents, and successors.		
Uses appraisal functionality to allow users to identify high potentials and assess readiness, risk, etc.		

Additional Features

If your application includes features not previously covered, please provide a brief overview of the capabilities, limited to one additional page. Include any additional fees or charges associated with the features.

Please complete the following items which will be considered part of the core segments of the Request for Proposals

Implementation

1. Please describe your implementation methodology and timeline, including data migration.
2. Describe the typical implementation project team.
3. What are the typical client roles and responsibilities?
4. What are the keys to a successful implementation? Please share any best practices. What documentation will be made available during and after implementation?
5. How do you coordinate the transition from implementation to ongoing customer support?

Education

1. Please describe your available training offerings.
2. Do you have suggested training for employees, managers, administrators? How is training delivered? On-site? Webinar?

Support

1. Please describe your customer support model. Does the customer have a designated account representative and support personnel?
2. What is the experience level of your service and support personnel including the average length of service?
3. Where are your support offices located? What are your support hours of operation? How do clients submit issues?
4. What is your response time for issues?
5. How can clients track the status of support issues? How are support issues escalated?
6. Do you offer in-application online help? Please describe.

Technology

1. Please describe the key principles that influence your solution's design.
2. Describe your software development cycle including frequency of releases, patches/hotfixes.
3. What are the minimum requirements to run your application? How many concurrent users can your application support?
4. Please describe how your application is able to interface with our existing third-party applications which currently include BeneTrac, Hartford Life, HR Online and Principal Financial Group.
5. Can provide single sign-on using Windows Authentication?
6. How does your company stay current with technology changes?

Hosting/Product Deployment

1. Please describe your hosting model. Where is your data center located?
2. Please describe the security features of your data center.
3. Are regular database backups performed? Please explain.
4. Do you provide clients with additional environments in addition to the production environment (i.e. testing, training, configuration, etc.)? Is there an extra charge?
5. How are upgrades of the application performed? How often are upgrades released?
6. What is the cost to perform upgrades?
7. What are the client's responsibilities with regard to upgrades?
8. Explain how all client specific configurations will be retained during upgrades. What documentation is provided with each new release of the application?

Security

1. Please describe your security architecture.
2. Please describe the security features of your hosting center(s). How is data encrypted in the application?
3. What third party testing in performed to ensure the integrity of the application's security? Provide a description of your company's disaster recovery plan.
4. Have you had any significant security breaches or failures in the last three years? If so, explain what you have done to prevent future breaches or failures.

Pricing
1. Please provide a pricing proposal for your solution. Be sure to include:
    *   Modules included
    *   Recurring fees
    *   One-time costs (inclusive of license, implementation, migration, and training)
    *   Estimated five-year cost.
2. Additionally, please specify if maintenance and support are included in your pricing.

References

Please provide three references. For each reference, provide organization name and location, contact name, title, and contact information, and a brief description of the project.