	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.

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

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

#	Requirements	Code	Comments
1	Communicates automatically with job boards.		
2	Posts internal and external jobs to company Internet site and company intranet site with effective dates.		
3	Has a requisition library of job templates that can be utilized when creating requisitions.		
4	Tracks expenses by applicant/candidate level and associate them with a specific requisition or a general recruiting activity.		
5	Sends automatic responses, notifications, or e-mails to applicants/candidates.		
6	Allows administrators to customize verbiage on the e-mail messages (including confirmation acknowledgement and job filled) to external and internal applicants/candidates.		
7	Allows users to e-mail potential interview times, applications, corporate material, and job opening status.		
8	Provides a library of standard communication correspondence for printing and distribution.		
9	Integrates seamlessly with standard e-mail systems (Microsoft Outlook, Lotus Notes) for applicant/candidate activity for hiring managers and recruiters.		
10	Allows administrators to schedule interviews, notify interviewers of times, locations and topics to cover.		
11	Distinguishes applicant/candidate status for internal or external candidates.		
12	Associates applications and resumes to a specific requisition without having to change screens/databases.		
13	Has history that consists of one candidate record with all the associated recruiting activity regardless of the number of requisitions.		
14	Can a resume/application be maintained in the system?		
15	Can a resume/application be searched using key words?		
16	Stores resumes for future use by category, job title, skill, or other user-defined attributes.		
17	Allows applicants/candidates to modify or replace their existing resume.		
18	House interview question templates for each job.		
19	Hiring managers and recruiters can review pre-screened applicant/candidate.		
20	Hiring managers and recruiters can track applicant/candidate status.		
21	Hiring managers and recruiters can schedule interviews.		
22	Hiring managers and recruiters can communicate with applicants/candidates via e-mail.		
23	Hiring managers and recruiters can view communication history.		
24	Hiring managers and recruiters can report on communications.		
25	View multiple recruiter schedules.		
26	Hiring managers and recruiters can view and print assessments between applicants/candidates.		
27	Hiring managers and recruiters can view and print applicant/candidates job history, qualifications and resume.		
28	Hiring managers and recruiters can record interview notes.		
29	Hiring managers and recruiters can enter additional applicant /candidate information if needed.		
30	Searches applicants/candidates based on a variety of criteria (e.g., location, skills, prior employers, zip code, and metropolitan areas).		
31	Has embedded workflow for approvals based on company-defined process including requisition approval, offer approval, and new hire approval.		
32	Allows users to attach documents to an Applicant/candidate record.		
33	Provides Web-based data collection for jobseeker users (both employee and non-employee).		
34	Allows administrators to create behavioral interview question sets per job opening.		

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

#	Requirements	Code	Comments
1	HR and manager new hire/rehire checklist ability, by position, with check-off ability as tasks are completed (for example, offer letter has been sent and received).		
2	Provides ability to automatically notify other areas of organization of new hire (security, payroll, etc.).		
3	Provides ability to automatically notify new hire of activities they need to complete and remind them if they don’t do them in a timely manner.		
4	Manager is prompted to assign correct property to the employee and location.		
5	Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		

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

#	Requirements	Code	Comments
1	Ability to predefine workflows and workflow tasks that vary according to the position being filled.		
2	Ability to delegate a proxy or change the owner for any specific task (secondary approval).		
3	Ability to track expected lead times vs. actual lead times to assist in planning (e.g., to determine the lead times for telephone provision is 72 hours).		
4	Ability to output a well-formatted completed form to hard copy print.		
5	Ability for hires to return and update or correct their information after the initial submission.		
6	Ability to provide task response and status via email reply.		
7	Ability to measure the performance of the onboarding process.		
8	Ability to vary the onboarding process workflow according to multiple candidate and position factors — employee type, business unit, job function, country and state, etc.		
9	Ability to monitor the overall status of the onboarding process, providing a clear indication of “new hire readiness.”		
10	Ability to make completion of one task a firm prerequisite to the initiation of other tasks.		
11	Ability for the hiring manager to enter all required data on behalf of the contingent worker.		
12	Ability to pre-populate form fields using data provided by unified Recruitment.		
13	Ability to brand the forms and pages seen in the new hire portal or page flow.		
14	Ability to automatically notify other areas of organization of new hire and terminations (security, payroll, etc.).		
15	Ability to close the requisition tracker — does the new hire automatically close the open requisition?		
16	Ability to facilitate automation of new hire paperwork collection and new hire responses for all businesses within the company.		
17	Ability to link to person prior to bringing on board to enable new hire process to begin earlier.		
18	Ability for HR and manager new hire/rehire to create/access checklist, by position, with check-off ability as tasks are completed (e.g., offer letter has been sent and received).		
19	Ability to automatically notify new hire of activities he/she needs to complete and then send reminder he/she does not complete these in a timely manner.		
20	Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		
21	Ability to click a button to hire the person, and data is automatically routed to payroll, benefits, and other applicable areas.		
22	Ability to interface employee’s I-9 to e-verify for United States.		
23	Ability to generate acceptance email notice/workflow notification to hiring manager, with start date.		
24	Ability to include range of documents, such as W-4, I-9, employee agreement, non-compete agreement, etc.		
25	Ability to provide electronic new hire packets, with ability to attach.		
26	Ability to deliver employment eligibility verification, with automatic status update and validation noted in employee profile.		
27	Ability to print a new hire package for candidate’s signature as well as workflow to generate appropriate pre-employment forms to be sent to the candidate.		

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

#	Requirements	Code	Comments
1	Changes to compliance requirements are maintained and updated by HRMS vendor.		
2	All compliance reporting can be generated for current periods and historical periods.		
3	Standard compliance reports include:		
4	EEO-3		
5	Workers Compensation		
6	Vets-100		
7	Automatic notification of I-9 expiration/visa expiration.		
8	COBRA qualifying events are automatically triggered based on employee transactions.		
9	COBRA letters can be generated from the system.		
10	Tracks any accommodations made to support the American with Disabilities Act (ADA).		
11	Tracks ADA and disability information.		
12	Provides military and veteran status for employees.		
13	Includes affirmative action compliance features.		
14	Provides HIPAA support.		
15	Provides worker's compensation support/report		
16	Creates separate, mandated government reports for each individual tax entity.		
17	Includes state-mandated "New Hire" reports (for child support payment tracking).		
18	Updates from HRMS vendor when federal/state/local regulations change.		

#	Requirements	Code	Comments
1	Delivers configurable comprehensive options to allow administrators to configure the continueous performance review process to their specific business needs without the need for technical or consultative services.		
2	Intuitive user experience that eliminates the need for end-user training for administrators, employees, and managers.		
3	Solicits performance feedback from multiple reviewers (e.g., subordinates, directors, other managers, peers) and exchanges data among multiple users simultaneously.		
4	Saves work in process/draft reviews and provides option to return to complete.		
5	Enables administrators to assign different review forms for different employees within the same review cycle.		
6	Enables employees to complete self-evaluations.		
7	Tracks performance review status and dates (e.g., complete, incomplete).		
8	Provides email reminders and overdue notices throughout the process.		
9	Maintains performance feedback and ratings history.		
10	Provides historical reviews that can be accessed easily by managers or administrators.		
11	Enables administrators to view the status of the review process at any time.		
12	Provides delivery of standard competencies and objectives.		
13	Provides goals management that allows either the employee or manager to create and add their own personal goals or objectives.		
14	Enables individual weighting of goals.		
15	Provides ability to assign employee performance objectives that align with your overall business strategy.		
16	Provides access to all talent factors, including employee information, review history, skills and competencies, education, salary history, and learning history, based on role.		
17	Enables reporting and analysis of performance ratings for various employee groups (e.g., by job, manager, geography).		
18	Provides a centralized gateway for managers to monitor the progress of their performance management activities — in one place.		
19	Summarizes performance review in an easy-to-read format that can be printed for future reference.		
20	Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		
21	Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		
22	Document coaching discussions.		
23	Document counseling discussions (performance improvement plan)		
24	Enables employees to initiate performance discussions.		
25	Allows different levels of approval process dependent on the event.		

#	Requirements	Code	Comments
1	Stores multiple iterations of possible succession plans for each team/leader.		
2	Provides printable/PDF capabilities.		
3	Allows configurability by the client or allows hard-coding from the vendor.		
4	Provides the ability to track and report on critical roles and critical talent.		
5	Delivers robust reporting, including exception reporting.		
6	Provides the ability to track core competencies associated with next/future job.		
7	Provides the ability to track the date/timeframe an employee will be ready for the next position.		
8	Provides the ability for employees and managers to create a development plan based on license, skills, training, education, and competencies.		
9	Provides the ability to track multiple language proficiency information, including speaking, reading, and writing, for each employee.		
10	Provides the ability to maintain multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.		
11	Provides the ability to track and search on the following data:		
12	skill description		
13	experience level		
14	proficiency level		
15	competency description		
16	Provides the ability to track employee licenses and certification and expiration dates.		
17	Provides the ability to track employee professional associations. Specify limit.		
18	Provides the ability to identify where employees are in their current performance and potential growth.		
19	Provides the ability to provide audit records.		
20	Provides the ability to be delivered with standard competencies and objectives. Administrators should be able to add and modify client-specific, effective-dated competencies.		
21	Enables the graphic display of the manager's direct report organization.		
22	Interfaces with learning management and development plans.		
23	Upload competency model from a third party vendor.		
24	Create HCAD's 9-box talent review and calibration process		

#	Requirements	Code	Comments
1	Managers can view summary data and analyze salary budget information for their departments.		
2	Managers can assign salary increases based on:		
3	Dollar amounts		
4	Percentages		
5	Combination of dollar and percentages		
6	Managers can create “what if” employee scenarios to ensure that increases do not exceed the department salary budget.		
7	Managers can apply “across the board” salary increases for a department.		
8	Managers can allocate different percentages and/or dollar amounts to different employees.		
9	Assign multiple salary increases to one employee (i.e., cost of living and merit increases).		
10	Rate changes and increases are effective-dated for payroll processing.		
11	Manager can plan for compensation, overtime, taxes and benefits.		
12	Manager can utilize advanced functions to calculate benefits (nested if/then statements, etc.).		
13	Manager can plan for pre-tax benefits.		
14	Manager can set budget using FTE or Headcount.		
15	Manager can plan for terminations, leaves, and new hires.		
16	Managers can plan for transfers between locations, departments and sections.		
17	Managers can plan for temporary, part time, half time employees.		
18	Managers can plan for temporary employees from an outside agency.		
19	Manager’s view of budget can be restricted to their respective departments/offices.		
20	Budget Data can be exported to excel.		
21	Current and prior year payroll data is accessible in the budget planning module.		
22	Manager can generate variance reports to compare budget to actual expense.		
23	System maintains historical budget records.		
24	Budget assumes all existing comp, taxes and benefits. remains the same, then allows for overrides as necessary.		
25	Company		
26	Location		
27	Department		
28	Title		
29	Section of Law		
30	Status		
31	Currency		
32	Compensation Only		
33	Benefits & Taxes Only		
34	Employee versus Employer Expense		
35	Operational Reports.		

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

#	Requirements	Code	Comments
1	Tracks core competencies associated with next/future job.		
2	Flags employees that are recommended for a specific job.		
3	Tracks the date an employee will be ready for the next position.		
4	Managers can create a career plan based on license, skills, training and education.		
5	Tracks multiple language proficiency information including speaking, reading, and writing, for each employee.		
6	Maintains multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.		
7	Does the system track the following data?		
8	Skill code		
9	Skill description		
10	Experience level		
11	Proficiency level		
12	Last date skill used		
13	Tracks employee licenses and certification and expiration dates.		
14	Tracks employee professional associations. Specify limit.		
15	Upload competency model from a third party vendor		
16	Upload learning content from a third party vendor		
17	Connect employee performance goals with learning goals and content		
18	Reqiest learning curriculum based on development and/or performance goals		

#	Requirements	Code	Comments
1	Maintains incident logs at the employee level.		
2	Can view a summary page/window showing all incidents for an employee.		
3	Can view the detail of an individual employee incident.		
4	Incident details include:		
5	Accident or exposure itself		
6	Date and time		
7	Days away from work		
8	Days of restricted work		
9	Illness or injury		
10	Complete incident description		
11	Ability to add notes.		
12	Case number may be auto incremented.		
13	All incident history is maintained indefinitely.		
14	Incident information and history are accessible through reporting.		

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

#	Requirements	Code	Comments
1	Provides total integration between benefits and payroll including other payroll vendors.		
2	Maintain calculations and limits in compliance with federal legislation.		
3	Assigns different benefit packages to different groups of employees based on eligibility rules.		
4	Establishes benefit/deduction plans with multiple types and options.		
5	Supports effective dated:		
6	Benefit/deduction plans		
7	Employee benefit/deduction plan enrollment		
8	Employer benefit/deduction plan enrollment		
9	Updates benefit/deduction plans based on employee status change.		
10	Tracks “waived” benefit/deduction plans.		
11	Assigns a rate schedule to apply new rates with future effective dates for the new plan year.		
12	Without writing a separate program, automatically updates premiums for age/salary driven benefit calculations.		
13	Automatically enrolls employees in required plans.		
14	Automatically cancels specified employee benefits upon termination.		
15	Allows benefit costs to be set up for the new year while continuing processing for the current year.		
16	Tracks and maintains information for dependents and beneficiaries.		
17	Calculates imputed income.		
18	Tracks and reports workers’ compensation claims.		
19	Facilitates reporting to third-party vendors such as benefit providers.		
20	Provides one screen that shows employee data (“benefits-at-a-glance”), without having to scroll through multiple screens.		
21	Defines and maintains benefit/deductions for the employee and employer.		
22	Includes automated schedules for benefits/deductions.		
23	Supports benefit/deduction goals and limits.		
24	Supports “catch up” contributions on deferred compensation plans.		
25	Recovers benefit/deduction amounts that have been put into arrears.		
26	Supports multiple arrear types.		
27	Includes defined start and stop dates for benefit/deduction.		
28	Processes one-time benefit/deductions.		
29	Maintains and tracks savings bond benefits/deductions.		
30	Restricts participants from receiving more than the annual limit for reimbursement accounts including 403(b) and 401(k).		
31	Includes pre-tax and post-tax benefits/deductions.		
32	Supports a designated default amount for each deduction code.		
33	Supports multiple types of life insurance, long term disability, short-term disability and age-banding.		
34	Supports flexible spending accounts (FSA).		
35	Display flexible spending account information such as:		
36	Plan information		
37	Balance of funds in account (s)		
38	History of transactions for reimbursements		
39	Maintains updated FSA balance.		

#	Requirements	Code	Comments
1	System provides next-year enrollment capability while in current year.		
2	From a Web browser, employees can:		
3	View current benefits and related information.		
4	Compare current benefits to the new benefits employees may choose to elect.		
5	Compare the cost of current versus new benefits.		
6	Make benefit elections from a list of eligible benefits.		
7	Keep existing benefit elections with no changes.		
8	Modify existing benefit elections.		
9	Make new benefit elections to replace existing benefits.		
10	Waive or decline benefits.		
11	Review, add, modify and remove dependents, beneficiaries and upload life event documentation.		
12	Review benefits and summary description documents.		
13	Link to benefit plan provider Web sites for additional information to help in making informed benefit and provider choices.		
14	Save “in progress” enrollments and then later return to modify choices, make additional elections and complete the enrollment process.		
15	Make life event (e.g., baby, marriage) benefit changes.		
16	From a Web browser, managers can:		
17	Describe benefit plans and include specific plan details.		
18	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).		
19	Specify the display order in which each benefit plan is viewed by the employee.		
20	Identify required and optional activities that designate an active versus passive enrollment.		
21	Limit the number of dependents to the employee for each benefit plan offered.		
22	Limit the number of dependent relationships to the employee for each benefit plan offered.		
23	View the statuses of all enrollments.		
24	Drill into benefit groups and plans to check specific enrollment information such as a list of employees whose enrollments are completed, in progress, or not yet started.		
25	Add or modify employee elections.		
26	Send due date reminders using an integrated e-mail feature.		
27	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).		
28	Create Internet links to benefit plan provider Web sites so employees can obtain additional details to help them make informed choices.		
29	Attach enrollment worksheets for employees to use when making life event benefit changes.		
30	Report and track benefits-related information and activities as they relate to new hires, benefit group changes, dependents, session setup, employee elections, and terminations.		
31	Export employee enrollment data (e.g., retirement 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.		
32	Supports default benefits which can be set up for new hires.		
33	Supports unique enrollment dates for each benefit plan.		
34	Provides a next year enrollment capability.		
35	Provides ability to report life event (e.g., marriage) and allow “eligible” changes to benefit elections.		

36	Allows updates to dependent information for life events.		

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

#	Requirements	Code	Comments
1	Supports leave types.		
2	Supports maximum duration of leave types and combined leaves, i.e. FMLA to PL and tracks by hours, days, and weeks.		
3	Tracks due dates of Certification of Healthcare Provider Form by associate.		
4	Tracks the approved date when the associate’s leave of absence is expected to start.		
5	Tracks the approved date when the associate is expected to return from the leave.		
6	Tracks and reports cumulative FMLA/PL time taken.		
7	Maintains leave of absence history.		
8	Calculates the planned duration, based on expected end and expected start dates.		
9	Supports workflow approval processes for leave requests initiated by associates or managers.		
10	Displays warning message during pay processing if time entered exceeds the leave balance.		
11	Complete government forms via system?		
12	Ability to upload forms.		

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

#	Requirements	Code	Comments
1	Defines employee's COBRA status, date of qualifying COBRA event, description of COBRA event, and date the COBRA notification letter was sent.		
2	Defines dependent's COBRA status, date of qualifying COBRA event, description of COBRA event, and the date the COBRA notification letter was sent.		
3	Automatically captures COBRA information during the termination process.		
4	Automatically generates COBRA notifications.		
5	Create COBRA notification letters and invoices.		
6	Exports all employee and dependent COBRA information to a third party COBRA administrator.		

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

#	Requirements	Code	Comments
1	System provides for an unlimited number of the following:		
2	Departments		
3	Divisions		
4	Locations		
5	Cost centers		
6	Jobs		
7	Supervisors		
8	Pay groups		
9	GL base accounts		
10	Tracks an unlimited number of workforce distributions in history.		
11	Allows at least four client definable organizational levels.		
12	Supports a multi tier workforce allocation (e.g., allocation on different fields, dept, job, location).		
13	Reports can be created with actual cost allocations including:		
14	Earnings		
15	Employee deductions		
16	Employee taxes		
17	Net pay		

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

#	Requirements	Code	Comments
1	Employees can view communications posted from administrators.		
2	Employees can access links that can launch:		
3	Documents (forms may be saved and/or printed).		
4	Web sites		
5	E-mails		
6	Employees can model their paycheck for changes including deductions, marital status, and exemptions.		
7	Employees can view and/or update personal information including:		
8	Name		
9	Address		
10	Phone numbers		
11	Emergency contacts		
12	Previous employment		
13	Educational background		
14	Employees can view their status and key dates.		
15	Employees can view company property assigned to them.		
16	Employees can view EEO/I9 information.		
17	Employees can view job information including:		
18	Job code and title		
19	Date and time in job		
20	Compensation		
21	Supervisor.		
22	Organizational levels		
23	Unlimited job history including change reasons		
24	Unlimited performance review history		
25	Unlimited salary review history		
26	Licenses		
27	Skills		
28	Tests		
29	Awards		
30	Employees can view unlimited pay history including:		
31	Net pay		
32	Hours by code		
33	Earnings by code		
34	Deductions by code		
35	Taxes by code		
36	Direct deposit distribution		
37	Employees can view current and previous year-to-date totals.		
38	Employees can view and update their direct deposit distribution and set effective date.		
39	Employees can download and print their W-2.		
40	Employees can designate that the electronic copy of the W-2 is the only copy that they require.		
41	Employees can enter time transactions.		
42	Employees can view benefit information including:		
43	Current benefit elections		
44	Employer contributions by code		
45	Beneficiaries and dependents		
46	Leave accruals and balances		
47	Cobra qualifying events		
48	Participate in an electronic open enrollment		
49	View all eligible plans		
50	View the costs associated with these plans		

51	Choose their benefit plan and coverage option		
52	Request time off from their manager		
53	Employees can update current benefits coverage based on the following life events:		
54	New hire		
55	Adding a dependent		
56	Removing a dependent		
57	Change in marital status		
58	Change in address/location		
59	Employees can view documents attached to their employee record.		
60	Employees can view open jobs.		
61	Employees can apply for open jobs.		

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

#	Requirements	Code	Comments
1	Offers role-based security (system access based on an individual's role within the organization).		
2	Offers control over which values a user may select from when changing employee data (e.g., user is allowed to assign a certain number of job or department codes).		
3	Offers the ability to copy roles when creating them.		
4	Includes built-in workflow.		
5	Includes a Web business rules feature that enables administrators to view and edit entries in code and description tables.		
6	Includes a company communications posting feature that enables you to make company information available 24 x 7 to users via the Web.		
7	Includes the ability to upload and securely share documents such as Microsoft Word documents, Excel spreadsheets, and PDF files.		
8	Offers a page linking tool that allows users to create hyperlinks from your portal to external Web sites, other products or other Web pages (e.g., link to your benefits network).		
9	Includes the ability to designate whether page links will appear inside the product framework or be launched in a second browser.		
10	Includes the ability to customize the color scheme for your Web pages.		
11	Includes the ability to re-brand the Web pages (i.e., use your own logo).		
12	Includes the ability to add your own menu items and Web pages, and still be contained within the system's security framework.		
13	Includes the ability to establish user-defined fields on Web pages.		
14	Offers the choice to display or not display user-defined fields on employee Web pages.		
15	Designates different levels of ability to manage system administration activities, from a super user with all rights, to users with lesser degrees of system administration access.		
16	Generates data-driven user names and passwords to increase the options for creating Web user login names and default passwords.		
17	Allows you to view user login activity.		
18	Adds non-employee users (e.g., IT support, auditors) as system users.		
19	Activates new Web users automatically or manually.		
20	Terminates employees' Web access inactivated automatically or manually.		
21	Resets user passwords.		
22	Requires strong passwords (case sensitive).		
23	Requires that passwords expire based upon a number of days designated by the system administrator.		
24	Requires that passwords for a given user are always different by maintaining password history.		
25	Stores and displays password hints to help remind users of their passwords.		
26	Uses a mass password reset to change the default password for one or all users.		
27	Ability to secure at a field level.		
28	Ability to audit who has viewed/changed items in the system.		
29	Can the system establish single log on for all components of system?		

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

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