HARRIS COUNTY

APPRAISAL DISTRICT

Harris County

Houston, Texas

REQUEST FOR PROPOSAL
RFP2019-09

Human Resources Management System Software

FOR THE
HARRIS COUNTY APPRAISAL DISTRICT
13013 NORTHWEST FREEWAY
HOUSTON, TEXAS 77040

Issued: October 16, 2019

The Harris County Appraisal District (HCAD or District) requests proposals (RFP) from qualified firms to provide a Human Resources Management System software application. Proposals (also called bids) are due no later than Thursday, November 21, 2019 at 10 a.m. Proposals may be mailed or delivered to the Purchasing Department at Harris County Appraisal District. Proposals will be opened and read at 10:30 a.m., at HCAD, in the 7th floor board meeting room.

PHYSICAL ADDRESS:	**MAILING ADDRESS:**
Attn: Tammy Argento	Attn: Tammy Argento
Purchasing Manager	Purchasing Manager
Harris County Appraisal District	Harris County Appraisal District
13013 Northwest Freeway	P. O. Box 920975
Houston, TX 77040	Houston, TX 77292-0975

The statement ***RFP2019-09 ENCLOSED*** must be indicated on all bid envelopes.

Questions pertaining to this bid should be directed to Tammy Argento, Purchasing Manager, at (713) 957-7401 or targento@hcad.org

The purpose of this RFP is to procure a software application for the Human Resources Division as a tool to manage some, if not all the following: time and attendance, talent management, benefits administration, recruitment, and mobile connection.

Pre-Bid Meeting to explain the expectations of software application will be held on October 23, 2019 at Harris County Appraisal District, 13013 Northwest Freeway, Houston, TX 77040, on the 6th floor, room 631, at 1:30 pm. The pre-bid meeting is not mandatory.

All proposals are subject to the General Conditions, Special Terms & Conditions, and Specifications as stated in this document. The Harris County Appraisal District reserves the right to reject any or all bids or accept the bid(s) deemed most advantageous to the District.

FAILURE TO COMPLY WITH THE GENERAL CONDITIONS, SPECIAL TERMS & CONDITIONS, AND SPECIFICATIONS CONTAINED HEREIN MAY RESULT IN BID BEING DISQUALIFIED

GENERAL CONDITIONS OF BIDDING

General Conditions of Bidding

1. **PROPOSAL**

    a. All bids must be on the form furnished by HCAD. The use of Vendor bid forms containing terms and conditions that conflict with those of the District constitute a counteroffer and are not acceptable as a bid.

    b. All bids are to be based on an as-is delivered basis and must include all costs that will be billed (i.e. insurance, set-up, fee, permits etc.).

    c. All bids must show the full name of firm bidding, with the name typewritten or in ink.

    d. All bids must follow the proposal components listed on page 12.

2. **PRICING**

    a. No change in price will be considered in the award of contract.

    b. Cash discounts will not be considered in the award of bids, and all quotations must be on a net basis.

    c. All prices quoted must be inclusive of all fees and firm for the term of agreement.

3. **TAXES**

    a. The Harris County Appraisal District is exempt from the Federal Excise and Transportation Tax, and the limited Sales and Use Tax.

    b. Unless the bid form or specifications specifically indicate otherwise, the price bid must be net exclusive of above-mentioned taxes and will be so construed.

    c. A Vendor desiring refunds of, or exemptions from, taxes paid on merchandise accepted by the Harris County Appraisal District, must submit the proper forms, and the purchasing agent, if satisfied as to the facts, will approve or issue the necessary certificates.

4. **AWARD**

    a. The District will evaluate and make award of the primary contract to the responsible offeror whose proposal is determined to be the most advantageous to the District considering the relative importance of price and the other evaluation factors included herein.

    b. Contents of the selected bid and all conditions, special terms & conditions, and specifications of the bid are contractual obligations.

c. Bidders having delinquent property taxes will not be considered for award.

5. PAYMENT

a. Payment will be made on invoices billed for services no later than the fourth Friday after approval of the invoice.

b. The District's obligations will be payable solely from funds appropriated in the District's budget for the year in which such obligations may be due and payable. If no funds or insufficient funds are appropriated for payment of obligations the contract shall be terminated without liability to the District, its officers, agents, or employees.

c. All invoices should be submitted to the following PO Box or email address:

accountspayable@HCAD.org

OR

Attn: Accounts Payable
Harris County Appraisal District
P. O. Box 920975
Houston, TX 77292-0975

6. CONDITIONS PART OF BID

The General Conditions of Bidding defined herein shall be a part of the attached bid.

SPECIAL TERMS & CONDITIONS OF BID

1. **Scope & Intent**

   The intent of this Request for Proposal (RFP) is to obtain proposals for a human resources management system to provide a solution to address our current and future management of employee related processes, programs and information for the Human Resources Division and the District.

2. **RFP Timeline & Purpose**

Request for Proposal (RFP) available to vendors	**October 16, 2019**
Pre-bid meeting	**October 23, 2019 1:30 pm**
Due date for RFP submission	**November 21, 10:00 am**
Award date	**TBD**

Pre-bid Meeting will allow potential vendors an opportunity to ask questions an receive information to the RFP.

Proposals received by HCAD after the 10 a.m. deadline on November 21, 2019 will not be accepted.

Award Date is anticipated to be December 18, 2019. The Chief Human Resources Officer will propose an award to the board of directors at the board meeting on that day.

3. **Questions** can be emailed to the Purchasing Manager, Tammy Argento, at targento@hcad.org. The questions and answers will be posted to the www.hcad.org website under the procurement menu, by 6 p.m. daily until November 15, 2019.

4. **Purpose**

   The purpose of this RFP is to procure a Human Resources Management Information System software that meets the requirements of the District.

5. **RFP Submittal Requirements**

a. Proposals must be submitted in a complete package containing all required supporting documentation.

b. Proposals must be mailed or hand-carried in a sealed envelope/package to HCAD. Proposals must be clearly marked on the outside with the Vendor's name, address, RFP 2019-09 and Date of Submission. Faxed or electronic submissions and postmarks are not acceptable.

c. Each bidder must submit one (1) original proposal with original authorized official signature and 1 additional copy with attachments included.

d. Pages must be stapled or bonded together, numbered consecutively with each section identified as outlined under Proposal Requirements.

e. All costs incurred in the preparation of the proposal are the responsibility of the bidder and will not be reimbursed by HCAD.

4. Bidder & Evaluation

a. Bidders are required to submit a properly completed Bidder Application form, Conflict of Interest form and a W-9 form with the bid. These forms are available at www.hcad.org in the Procurement menu. It is the responsibility of the bidder to inform the District's purchasing office of any changes/deletions/additions to this form as is deemed appropriate. This application is used to establish a bidder's database, which is maintained for a bid mailing list, and other references as required.

b. No vendor having or having had a contract with the District will be given more consideration than any other bidder.

c. During any part of the bid process, from preparation of specifications through the issuance of a purchase order, the District reserves the right to seek any additional information, clarification, and/or verification deemed necessary to render a reasonable responsive evaluation, and recommendation to the District's board of directors.

d. Evaluation will determine the ability of the Vendor to provide the most efficient service in the most economical method for the District.

e. Award of contract shall be made only to a responsible respondent/bidder who has demonstrated competence to deliver the specified services, a proven record of business integrity and ethics and the ability to meet the requirements of this solicitation.

f. Other criteria will include pricing in all respects, quality of service, availability of service, past performance, references, current property tax account and meeting of all requirements and specifications.

g. Proposer must have been providing professional HRMS services for the past (5) years.

h. Proposer must have been a legal business entity, authorized to do business in the State of Texas for a minimum of (3) years, as evidenced by the submission of copies of the Proposer's business license(s) for those three (3) years.

i. Proposer possesses liability, worker's compensation and any other insurance in the amount commensurate with the services to be provided.

j. The lead project manager must be a certified Project Manager, as evidenced by a Project Management certification.

k. The lead project manager must have at least five (5) years of professional PM/Implementation experience, including experience with all facets of the business' application.

6. Conditions

The contents of a successful bid may become contractual obligations, if a contract is awarded. Failure of the respondent/bidder to accept those obligations may result in the cancellation of the response/bid/application for selection. The contents and requirements of the solicitation may be incorporated into any legally binding and duly negotiated contract between HCAD and the selected respondents(s)/bidder(s). HCAD reserves the right to withdraw or reduce the amount of an award or to cancel any contract resulting from this procurement if there is misrepresentation or errors in the specifications, pricing, terms or bidder's ability to meet the terms and conditions of this solicitation or if adequate funding is not received.

7. Cancellation

Either party may terminate this agreement with or without cause with 30 calendar days written notice.

a) Severability

If any section, subsection, paragraph, sentence, phrase, or work in these specifications shall be held invalid, such holding shall not affect the remaining portions of these specifications and it is hereby declared that such remaining portions would have been included in these specifications as though the invalid portion had been omitted.

Bid Specifications

Scope of Work/Technical Requirements

HCAD is soliciting proposals from software companies for an integrated human resource management system along with related implementation services to replace the current software solutions that are in place at the Harris County Appraisal District. The objective of this project is to select and implement a new HRIS/HRMS software to address the District's current and future Human Resource needs.

As a result of the district's focus on employee development, an integrated service is needed to support future initiatives. The District's enterprise processes (i.e., position management, compensation, employee development, on and off-boarding, etc.) must operate in an integrated solution, create operational efficiencies for the users, be simple, consistent and cost effective, be easily improved, and yield high quality, accurate data to conduct predictive analysis in support the District's success.

The new system is intended to be a solution that leverages technology and includes features and functionality that will improve District operation, self service capabilities, and management reporting. This system will replace the District's Human Resource functionality that currently resides in Kronos and Halogen. The selected solution should support the business processes of the District's Human Resources division.

Respondents must respond to the price component of this RFP for the following:

- Software/subscription acquisition and installation
- Implementation services
- Interface costs and support
- Projected ongoing costs for upgrades and maintenance

The Human Resource Management Software solution along with related implementation services for the District includes, but not limited to:

- Human Resource Management
    - Employee Records
    - Benefits Administration
    - Recruitment / Onboarding
    - Compensation Administration
    - Performance Management (Employee Development)
    - Learning Management
    - HR Analytics
- Manager & Employee Self Service
    - Personnel Changes
    - Benefit Elections
    - Standard Reports
    - Business Analytics
    - Dashboards

- Technology
  - Ability to create/manage bi-directional interfaces with Kronos Dimensions
  - Ability to create inbound/outbound automated interfaces
  - Production and testing environments
  - Conversion of historical data
  - Audit trail capabilities
  - Mobile and Web-enabled
  - Interfaces

Deliverables and Specifications

The Project will include, at a minimum, the following deliverables:

- **Project Plan**
  The vendor will assign a Project Manager and a detailed project plan that includes all implementation tasks, deadlines, milestones, deliverables, etc. and will provide a scorecard or dashboard mechanism for reporting progress. The vendor Project Manager will meet with the District's project team on a regularly scheduled basis.
- **System Design Documentation**
  The purpose of this document is to describe the following in detail:
  - Provide standard out-of-the-box (OOTB) features and functionalities
  - Technical description of the hardware, software, infrastructure, interfaces, database schemas, and any required third party software dependencies
  - Business process flows, job aids, procedures, and training materials to assist in transition from current processes
  - Will comply with all federal, state, and local HR regulatory requirements
- **Data Conversion**
  Current human resource data will need to be converted for historical purposes, and to populate master data records in the new system.
- **Test Plan**
  Based on experience with other customers and knowledge of the District processes, vendor will provide detailed test plan suggestions to be reviewed with Human Resource and other District staff. Once reviewed and refined together, test plans will be added to the project plan to track completion.
- **Cutover Plan**
  The overall project plan will include a detailed Cutover Plan, which will contain a complete sequence of events required at the time of cutover. This should include systematic procedures for both systems and business processes to transition from our current system.
- **Ongoing Maintenance and Support**
  The vendor will provide ongoing support and maintenance of the product. The proposal should include a description of the support packages offered and their associated pricing structures.

  The proposals should reflect an understanding of the dynamic business environment required to support the District and should deliver a user-friendly set of tools that allows the District to focus on its core business.

Technical Requirements

The District is looking for a fully integrated solution. The software solution must be able to handle all the functionality required by the District in the various functional areas of HR. All OOTB functionalities should be provided by the respondents. If the proposal contains third party software, the vendor should have experience integrating with the proposed software on another project.

The District requires that the vendor and its subcontractor provide both the software and the implementation services for this project. Implementation should follow the best practices for an integrated implementation. It is the vendor's responsibility in their proposal to outline which modules/processes are implemented in what order and the logic for that sequence. The proposal should provide implementation timeline options for core functionality.

The District expects the vendor to utilize a discovery phase to work with the functional teams to review processes and document future state processes, based on best practice systems, not recreating current state processes. The proposal should describe at a high level the approach they will follow that reduces risk, ensures a high-quality implementation, moves at a rapid pace, and is strategically planned to make transitions as seamless as possible.

The District requires that the respondent describe the software lifecycle of their product including version control and any planned future releases and functionality. The District is looking for a long-term, sustainable solution that will meet the growing demands and changes of the District. Therefore, the solution provided must not be limited in its ability to grow and change over time. The District wants to engage with a vendor that uses standard software development and implementation practices.

Data and System Functionality

As stated previously, the District currently functions with multiple systems and manual processes that require multiple points of re-entering data and do now allow for a comprehensive view of the District's data. The District is seeking to integrate HRMS and Kronos Dimensions Payroll and Timekeeping systems to dramatically shift the work process and flow of data.

The respondent should describe how their solution functions and addresses integration with Kronos Dimensions payroll and time and attendance. The District wants to make ensure that duplicate keying will not be required in multiple systems.

The District requires that history of changes (e.g. salary, position) be maintained, accessible, and reportable in the system. The vendor should describe what data history is maintained, how it is accessible, and who can access it.

Configuration/Customization

While the District would like most of the software and functionality to be "out of the box" and included in the base product, the District also understands that there may be a need to configure the system. The respondent should describe their process and approach to configuration – including how configuration requirements are gathered and confirmed, how and when configurations are implemented in the system, who has the ability and responsibility to make configuration changes, and how configuration changes are confirmed.

The respondent should describe the process and approach for how configuration changes are made prior to system implementation and how these changes are made post-implementation.

Flexibility and Scalability

The District is asking the respondent for standard functionality for the majority of HRMS. However, while the District wants to have a standard, best practice based designed solution, it is critical there is some flexibility and scalability to the solution. The respondent should describe how the solution can scale to accommodate the District's requirements and users. Respondents should also discuss the level of customization that can be implemented and what limits there are to customizations.

Security

A high level of system and data security is a critical attribute of all District systems. Respondents should describe their security policies and protocols to ensure that District data would be protected. This should include: how you protect your systems from viruses, backup procedures, access logs, data store and transfer processes, and accessibility of audit trails.

Data Ownership

The District will maintain ownership of all its data. No District data should be made available or accessible to any third-party organization or data source other than those that have been authorized through this contract to work with the District and the selected vendor. In any case that a contract between the District and vendor is discontinued, the vendor must provide the District all its data within 30 days of the termination of the contract. Respondents should discuss in detail the protocol they will use to provide data to the District should the District and the vendor discontinue a contract.

Disaster Recovery

The respondent should describe disaster recovery plans and policies to ensure that any system the District purchases will be secure and available. The disaster recovery plans should include detail on all the off-site or redundant facilities, processes, and services the respondent has in place to ensure the District's system and data are secure.

Performance

The new system will be critical to the District's operations and must be available to carry out processes such as human resource benefits enrollment and end-of-year processes. Therefore, the District needs to understand service level agreements (SLA) that the vendor will commit to and performance the respondent has for clients, including system availability and performance monitoring processes. In addition, respondents should provide detail about system maintenance windows and how these are planned and communicated to clients.

Change Management/Training/Documentation Requirements

The integrated HRMS solution project will have impact across the District, every division and employee. The new system will replace systems and processes that have been in the District for a long period. The District recognizes that a significant change management effort is necessary for the project to be successful. Therefore, the District would like the vendor to provide change management and training services to support the system implementation.

Historical Data Import Requirements

The District has a need to move data from historical systems to the new HRMS for the purposes of reporting and inquiries. The vendor will work with the District to review applicable data sets and develop a detailed plan for importing historical data based on how the District needs to access and use this data.

The vendor will work with the District to cleanse and prepare data for import. The respondent shall include historical data import in the project plan and testing plan. The respondent should specify costs for historical data import in pricing.

Detailed Product Functionality

Technology/Architecture:

- Provide a brief overview of your products with a summary of the functionality. Indicate if the product was developed by your company or purchased.
- What is the core product of your business?
- What separates your product from your competition?
- Provide an overview of your system architecture.
- Describe your workflow services.
- Describe your customization and extensibility capabilities.
- Describe your system's ability to have customers "configure" the system vs. having you "customize" the system to meet their needs.
- Describe your security architecture, including any significant failures, breaches or issues encountered in the last five years.
- Define your system architecture, as well as hardware, and "other" software requirements.
- Who are your technical partners?
- Provide a description of your company's disaster recovery options.
- Describe how your organization provides periodic system performance evaluations for all installed applications. Identify ways to improve system utilization and improve overall performance.
- How does your company stay current with technology?
- Describe how your system complies with applicable federal, state and local laws, regulations or ordinances.
- Please provide the methods supported for disaster recovery and data achieving.

Hosting:

- Do you offer your products as Licensed, Hosted, SaaS or all three?
- If you offer a Hosted and/or a SaaS model, what is your target market?
- If you offer a Hosted and/or a SaaS model, why should we select it?
- If you offer a Hosted and/or a SaaS solution, what is the data center and network infrastructure?
- If you host the application, what types of technical resources are required?
- Provide a brief description of the security measures you provide in your hosting and/or SaaS environment.

- If data centers are physically secured, explain the method/technology used.
- Does your hosting solution include a guaranteed level of system performance, such as sub-second response time?
- Describe your customer support process for application hosting or SaaS customers.
- If Hosted and/or SaaS, what control would we have with making application modifications – screens, tables and fields?

Product Overview:

- Provide a brief overview of your product offerings.
- How do you differentiate yourself from your competition?
- Who are your product partners?
- How do you stay current with changes in human resources and payroll?
- What enhancements are planned for your product over the next three years?
- Please specify the name and version of the HRMS considered in this RFP.

Support:

- How does your HRMS/PAYROLL SYSTEM support multiple companies?
- How does the system handle acquisitions and mergers? Specifically, what is required to add a new company to the system?
- Describe employee transfers between and/or within companies.
- Describe how a cost center [job number / activity number] is added and deleted in your system.

Organization Structure:

- Explain how/if your system creates organization charts.
- Describe how your system maintains associate "report to" data.
  Describe how your system handles/manages large reorganizations.

Recruiting, Hiring and Applicant Management:

- Provide a brief description of your recruiting and applicant management system.
- Describe your candidate pre-screening or qualification process.
- What job boards are supported with your product? Describe how jobs are posted to Internet job.
- Does your system allow for an automatic e-mail response to applicants and candidates? If so, please describe the communication types included in the application. Can we customize the responses?
- How is an applicant transitioned to an employee in your system? If the systems are integrated, describe the file transfer process and the technology applied.
- How does an applicant apply for a job online?
- Describe your employer configurable new hire workflow.

Termination:

- Describe your employer configurable termination workflow and how it supports termination of employees and independent contractor assignments.
- How is your system used to notify appropriate areas of the organization (security, IT, Payroll) that an employee or independent contractor has been terminated?

Onboarding:

- Please provide a brief overview of your onboarding solution.
- What are examples of the forms your solution supports that are typically completed by the hiring manager and/or new hire?
- Please provide examples of how your solution assists in conducting employment verification.

Human resources:

- Describe your system's HR functionality.
- Is this system integrated with the payroll system?
- When was this human resources product developed?
- Was this application developed in-house or purchased?
- Describe the types of historical information your system maintains (including number of years maintained).
- How do you support electronic signatures?
- Describe the HR process for transferring an employee between departments and/or companies.
- Are there duplicate fields in both HR and Payroll that can be updated and modified? What is the timing? Describe how it works.
- Explain how a "re-hire" is identified and how previous history and years of service are recognized.
- Can electronic files and scanned documents be stored by associate on your system? What limitations, if any, exist? Describe the process to terminate an associate on the system.
- Describe how your system can trigger events beyond pay for terminated employees (e.g., remove system access, revoke access cards, remove PIN numbers for wire transfers, etc.).
- Describe how a terminate action can be reversed on the system.

Compliance:

- As human resource regulations change, how do you ensure your clients stay in compliance?
- Explain how your system maintains OSHA-like logs.
- Describe how the software facilitates the maintenance of employee data and creation of employee history.

Performance Management:

- Please describe your performance management feature.
- Describe how the system can provide real time monitoring of performance management.

- Can performance or other performance related documents be attached to an employee record?

Talent Management:

- Please provide a brief overview of your talent and succession management functionality.
- Please describe how talent management functionality is integrated with performance management and development offerings.
- Please explain how succession plans are created.
- How much historical information is available?
- What types of reporting and metrics are available on the succession data?

Compensation:

- Provide an overview of the key compensation features of your system.
- How is the compensation features integrated with the HRMS/PAYROLL SYSTEM functions?
- Explain how your system creates and retains salary history.
- What types of reports are available for compensation?
- Describe how your system manages bonus pay.
- Describe how your system manages incentive pay.
- Describe how your system manages separation pay and other discretionary pay.
- Explain how pay changes are entered in the system.
  Describe how a mid-period salary change is processed.
- Explain how the system allows managers to plan salary increases online, process approvals via workflow, and automatically implement increases on the effective date.
- Explain how annual merit increases are processed in your system.
- Does your system validate minimum and maximum salary (of band pay ranges) when pay is changed, and provide warning messages as needed?
- How is compensation modeling handled in your system?
- Describe how salary ranges/grades are established in the system, grades are assigned to positions/jobs, and positions/jobs are assigned to associates.
- Describe how salary range/grade changes are made in the system, those changes are reflected in positions, and to associates assigned to those positions.
- Explain how job information is established and maintained in your system (e.g., grade, exemption status, EEO code, etc.).
- Explain how your system calculates, displays, and reports compa-ratio and/or quartile information.

Budget:

- Please describe how your budget administration tool will assist our organization with effective decisions regarding future compensation.
- What are the steps involved in creating a budget worksheet for your managers?

Employee Relations:

- Please describe how disciplinary actions are accommodated.
- Please describe your capabilities to track grievances.

Employee Development:

- Please describe how employee development and succession planning are accommodated in your system.
- Describe how the employee development feature is used by employees.

Organization Charts:

- Explain how your system creates organizational charts.
- Describe how your system maintains employee "report to" data.
  Describe how your system handles/manages large reorganizations.

Benefits:

- Describe the integration between benefits and payroll.
- How does your system handle benefits administration?
- Explain how your system facilitates reporting to third party vendors such as benefit providers Does the benefit data automatically populate in payroll? Is it real-time or a batch process?
- Does your system have a module to maintain Worker's Compensation Claims, Costs, tracking lost time, restrictions, legal reporting requirements, regular reporting, etc.?
- Does the system allow for tracking of all notes, conversations, etc.?
- How do you support electronic signatures?

Open Enrollment:

- Describe the system capabilities for online benefits enrollment (e.g., eligibility rules, plan dates).
- Describe how your self-service solution can be used to guide employees through benefits enrollment.
- What tools do you have available for benefit administrators to monitor and provide a smooth enrollment process for the company and its employees?
- Is workflow associated with benefit enrollment and life event changes?

Life Events:

- Please describe the life events that come standard without configuration.
- Describe how the available life event options are established and maintained in your system.

Flexible Spending Account (FSA):

- Does your system support FSA and HSA accounts?

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

Retirement Plans:

- Describe how your system exports retirement plan enrollment/change data to a ready-to-send file that can be transmitted to record keeper/trustee on a weekly basis or at initial enrollment.
- Describe how you manage retirement plan changes from third-party vendors.
- What types of information have you provided to third-party vendor regarding address changes, terminations, etc?

Position/Job Management:

- How are position/job statuses maintained in the system?
- What information associated with the employee is controlled by the position or job?
- Will the system enable us to track positions currently including those budgeted now, in the future, and in the past?

Payroll:

- Describe how HRMS will integrate with Kronos Dimensions payroll.
- How frequently will the data flow to and from Kronos Dimensions payroll system.

Deductions/Benefits:

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

Workforce Allocation:

- Explain how the proposed system would allocate by different organizational levels and projects.
- Describe how the proposed system handles employees with multiple supervisor assignments.
- How would employees with multiple jobs or positions be handled?

History:

- Explain the kinds of historical information your system maintains.
- What accumulators are standard? Please give examples.
- For archived records, what is the retrieval time?
- How is system performance affected by the growth of the historical records?

Conversion:

- Describe how existing history is extracted and imported to your system at conversion.
- Are there fees associated with converting history?

Post Conversion:

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

Employee Self-Service:

- Describe your application's employee self-service functionality. What are the major features?
- How will this be integrated with Kronos Dimensions payroll system to provide employees a one stop for all employee related information?
- When was this product developed?
- Was this application developed in house or purchased?
- How will your employee self-service feature assist in the communication between the district and employees?
- What types of information can be made available to our employees so they can be self-sufficient?
- Can pictures be embedded in an employee record? What are the file types?

Manger Self-Service:

- Provide an overview of the features available through the manager self-serve.
- Describe how a manager's access to employee information is controlled.
- Describe the integration between your manager self-service application and your HRMS.
- Describe to what level access to information can be controlled (e.g., screen, field, etc.).
- Does the application provide managers access to the entire employee self-service functionality? Please explain.
- What employee data is a manager NOT able to access and does client control?
- Are managers able to run reports from self-service? How is this performed?
- Describe how managers can create and save their own reports.

System Administration:

- Explain the delivered capabilities for a system administrator to manage self-service?
- Can you have multiple system administrators?
- What limitations would a system administrator have in managing self-service in a hosted environment?

Workflow:

- Describe the workflow capabilities delivered with employee self-service.
- Please describe the workflow setup including where custom programming is required.
- Do you supply any predefined workflow processes? If so, how many are delivered as standard? How much flexibility does client have in building workflows?
- Can you have multiple levels of approvals for your workflow?

- Ability to configure notifications upon hire/term via both email and APIs to enable automated business workflow orchestrations.
- What tools are available to enable workflow in your system?
- Can there be different workflow/approval paths based on reason or if/then else logic of a change (e.g. over threshold, level of person requesting the change)?

Reporting:

- Provide a brief overview of your reporting tools and how they are integrated with your HR and Kronos Dimensions payroll system.
- Describe the ad-hoc report writer that is delivered with your software.
- Is this part of the software or a 3rd party addition?
- Describe the difference between Web and client reporting functionality.
- Describe your point-in-time reporting capabilities.
- Describe your ability to create workforce alerts (e.g. e-mail reminders, reports).
- Describe any limitations creating online web reports? (e.g. formatting, fields, tables)
- Can the system support links to other websites?
- Discuss how a non-technical user can obtain reports from the system without assistance.

Database:

- What databases does your application support?
- Describe the enterprise's responsibility in maintaining and managing the database(s).
- Does your system allow backups with no downtime? Does it allow for backups to be unattended? When are backups completed i.e. time of day?
- Describe the ease and flexibility for extrapolating data, and maintaining and creating sub-files and macro-processes.
- Do you provide your clients with a data dictionary?
- How does your application handle multi-user contention or concurrency?

Security:

- Describe the proposed system's Application level security.
- Does your application use a secure connection if hosted? If so, please explain the security model used.
- Does the proposed application support single sign on?
- Is your security role based or user based?
- How are the users and security roles administered?
- What is the application authentication process? What methods are used to authorize users?
- Can users have more than one security profile?
- Does your application allow for customer defined ID and password methodologies?

- Does your application allow for global security policies (e.g., number of invalid attempts before reset, time outs)?
- How is validation for forgotten passwords processed when an employee locks out or has forgotten log-on information?

Customization:

- Describe the delivered tools and methods required to customize your application. Can we perform these customizations or do you the vendor need to modify the system?
- Describe customer configuration vs. vendor customization for product.
- Can we customize the look and feel (e.g., logos and colors) in your application?
- How are customizations preserved during product updates?
- What is the effect of future upgrades on our customizations?
- Explain the ability to configure data entry screens and to create new inquiry screens.

Implementation:

- Please describe in detail an example of a typical project implementation including data migration and completion timelines.
- What is your process for effectively managing the implementation process?
- What is the ratio of implementation and training to software license fee?
- How long is a typical product implementation?
- Describe the typical implementation project team. Who is the primary point of contact during implementation?
- Describe your approach to identifying, managing, mitigating, and tracking of project risks. Provide a sample risk mitigation plan.
- Describe your issues management approach and plan. Provide a sample issues management plan and log.
- During the implementation process, do your consultants assist with process improvement and/or best practices? Provide examples.
- How many employees from client are needed to support the project?
- What is your process for moving from implementation to customer maintenance?
  How long does implementation team stay with client before transferring to customer service?

Knowledge Management:

- Provide an overview of your training programs and delivery methods.
- Is there a test database utilizing real data available for future new employee training?
- Is there a cost associated with training during or after implementation?
- What ongoing training is available?
- What training materials do you provide?

Customer Support:

- Provide an overview of your customer support and maintenance services.
- What is the cost of your annual maintenance plan?
- Do you use your Web site as a mechanism to provide support to your clients? How is the Internet part of your support strategy? Please explain.
- What is the experience level of your service and support staff? What is the average length of service in your support area?
- How does your firm educate and train your service and support staff?
- What technologies do you take advantage of to run your support organization?
- What hours does your company provide service and support?
- How many support centers do you have and where are they located?
- Is there weekend or after hour support?
- Is there an after-hours emergency contact number if needed? Is there a charge for this service?
- How often do you release new versions of your software?
- Do you have any user groups (regional or national)?
- Do we get change information prior to release?
- What is the test process for new versions?
- How do you determine and prioritize changes in your system?
- What is the migration process in upgrading to new versions?

Product Functionality Legend: Please use the below Product Functionality Legend to complete the attached Excel spreadsheet titled "Product Functionality" provided as a separate attachment.

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.

Proposal Components

I. Proposal Cover Statement

The Proposal Cover Statement with original signature of the authorized Representative must be attached to the original proposal and must precede the narrative. Copies of the form must also serve as the Proposal Cover Statement for the additional copy attached.

II. Table of Contents

Include a Table of Contents.

III. Organization's Narrative

State your organization's mission, vision and its overall operation including company structure, company location(s), and type of services provided, geographic information and years in operation. Provide a list of your Houston office locations. If office locations are not local, describe how your firm intends to provide responsive and quality services to HCAD.

Give a brief history and description of your organization and the business in which you are engaged. (When was your organization founded? How long have you been in the current business? Who are your customers? Do you have experience working with public sector organization? How is your organization governed and managed?)

List any accreditation and/or affiliation your organization may have with local, state, or national oversight organizations.

Describe the experience of your staff in delivering your service, including their credentials.

Tell us anything else you would like us to know about your organization that is relevant to your proposal.

(No more than 2 pages, maximum for the organizational narrative.)

IV. Bidder's Experience

Describe your company's experience with government agencies, including years in operation and experience. Identify the Project Manager and other key personnel who will be administering the contracted services. Provide three professional references.

V. Cost/Fee Information

Detail the total costs and fees for providing the goods/services as well as training and technical assistance (if applicable) on the utilization of the service as outlined in the Scope of Work.

VI. Proposal Evaluation and Selection

1. HCAD will record the vendor's name and address in its log sheet.
2. HCAD will utilize a Selection Committee to review and evaluate all RFPs submitted.

3. HCAD will evaluate all proposals according to a set criterion that is scored and then weighted as to importance in the overall evaluation process.
4. Proposals will be evaluated only on information submitted in the proposals.
5. Awards shall be made to the bidder whose bid is responsive to the solicitation and is most advantageous to the recipient in terms of price, quality and other factors considered.
6. HCAD has the right to accept or reject any or all proposals.

VII. Required Form

1. Proposal Cover Statement
2. References
3. Bidder's Application Form
4. Conflict of Interest
5. W-9

PROPOSAL COVER STATEMENT

COMPANY NAME____

COMPANY STREET ADDRESS ______________________________

CITY, STATE, ZIP ____________________________________

PHONE NUMBER ______________________EMAIL ______________________

CONTACT NAME ______________________________________

COMPANY STATUS: (Please circle) CORPORATION PARTNERSHIP INDIVIDUAL

PAYEE IDENTIFICATION NUMBER________________________

PROPOSAL SERVICES: __**RFP2019-09 Human Resources Management (HRMS)**

COMPANY'S PRIOR YEAR NET OPERATING BUDGET: $__________________

BID PRICE: $____________________________________

It is agreed by the undersigned Supplier that the signed delivery of this Proposal represents the Supplier's acceptance of the terms and conditions of this Request for Proposal including all specifications and special provisions. Signature of the authorized representative **MUST** be of an individual who legally may enter his/her organization into a formal Contract with HCAD.

Failure to sign this Proposal Cover Statement, or signing it with a false statement, shall void the submitted Proposal or any resulting Contracts, and the Supplier shall be removed from all Proposal lists.

By the signature below, the signatory for the Supplier certifies that neither he/she, the firm, corporation, partnership, nor institution represented by the signatory or anyone acting for such firm, corporation, partnership or institution has violated the antitrust laws of this State, codified at Section 15.01, *et seq*., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the Proposal made to any competitor or any other person engaged in the same line of business, nor has the signatory or anyone acting for the firm, corporation, partnership or institution submitting a Proposal committed any other act of collusion related to the development and submission of the Proposal.

I/WE HEREBY PROPOSE to provide the HRMS bid to abide by the conditions and specifications herein, except as noted below under *EXCEPTIONS AND CONDITIONS OF THE BIDDER*. Any deviation from the item specifications must be noted on the bid sheet for that item referenced below.

EXCEPTIONS AND CONDITIONS OF THE BIDDER

Item specification deviation notations appear on bid item numbers:
If none, so state.

____

____

____

____

____

NAME OF FIRM SUBMITTING BID *(Print or Type)*

______________________________ ______________

STREET ADDRESS *(Print or Type)* **TELEPHONE NO.**

____

CITY, STATE & ZIP CODE *(Print or Type)*

______________________________ ______________

NAME & TITLE OF PERSON SUBMITTING BID *(Print or Type)*
EMAIL ADDRESS
(Officer of the Company or Authorized Sales Representative)

____

SIGNATURE OF PERSON SUBMITTING BID *(Print or Type)*

REFERENCES

List below references with which the Bidder has provided similar services during the past three (3) years.

FIRM NAME: ______________________________

ADDRESS: ______________________________

PHONE NUMBER: ______________________________

CONTACT PERSON: ______________________________

DATE OF CONTRACT: ______________________________

FIRM NAME: ______________________________

ADDRESS: ______________________________

PHONE NUMBER: ______________________________

CONTACT PERSON: ______________________________

DATE OF CONTRACT: ______________________________

FIRM NAME: ______________________________

ADDRESS: ______________________________

PHONE NUMBER: ______________________________

CONTACT PERSON: ______________________________

DATE OF CONTRACT: ______________________________

Harris County Appraisal District
Purchasing Office
P. O. Box 920975
Houston, TX 77292-0975
713-957-5214
www/hcad.org

GTA:ADM:001(11/06)

Bidder Application Form

Type of Application ☐ **Initial** ☐ **Revised**

Name of Business			
Street Address	City	State	ZIP +4
Telephone Number *(area code and number)*	Fax Number *(area code and number)*	Website	
Mailing Address for Bid Notices/Purchase Orders	City	State	ZIP + 4
Primary Contact/Account Representative	Telephone Number *(area code and number)*	Fax Number *(area code and number)*	
Email		Pager *(area code and number)*	
Mailing Address for Payments	City	State	ZIP + 4
Billing Contact	Telephone Number *(area code and number)*	Fax Number *(area code and number)*	

Payment Terms: ____________________ % Discount in ______________Days or Net in ______________Days

Legal Structure

☐ Individual ☐ Proprietorship ☐ Partnership ☐ Joint Venture ☐ Corporation ☐ Other

Business Type

☐ Retail	☐ Manufacturer	☐ Services Contractor	☐ Construction Contractor
☐ Distributor	☐ Manufacturer's Representative	☐ Consultant/Professional	☐ Other ______________

Parent Company Name	Federal Employer I. D. or Owner's Social Security Number (attach completed W9 Form)

Location of Ownership ☐ ☐	Number of Employees Your Location ________ Company-wide ________	Years in Business

Small Business Concern

☐ Minority Business Enterprise ☐ Women's Business Enterprise ☐ Disadvantaged Business Enterprise ☐ Historically Underutilized Enterprise

Certified by (attach copy of certification)
☐ State of Texas ☐ Metro
☐ City of Houston ☐ Other
☐ Houston Business Council

Property Tax Information for Business

Real Estate Account Number	Business Personal Property Account Number		
Name of Owner			
Owner's Mailing Address	City	State	Zip Code

(Continued on next page)

References (Please give contact person and telephone number)

Government		Private Sector	
Name of Entity/Agency		Name of Company	
Contact	Telephone Number *(area code and number)*	Contact	Telephone Number *(area code and number)*
Name of Entity/Agency		Name of Company	
Contact	Telephone Number *(area code and number)*	Contact	Telephone Number *(area code and number)*
Name of Entity/Agency		Name of Company	
Contact	Telephone Number *(area code and number)*	Contact	Telephone Number *(area code and number)*

List license or permit, if required, to provide product or service.

Name of License Holder	Type of License/Permit	License/Permit Number

Certification

I do hereby certify that the information provided on this form is true and correct.

Date ______________________ Signature of owner or agent ______________________

Please indicate all commodity and service classes that apply to your company on the next two pages and return to:

Harris County Appraisal District
Purchasing Office

Physical Address:
13013 Northwest Fwy.
Houston, TX 77040

Telephone:
(713) 957-5214
(713) 957-7401
(713) 957-5260
(713) 957-7418

Fax:
(713) 957-5208

Mailing Address:
P. O. Box 920975
Houston, TX 77292-0975

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor or other person doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. *See* Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 **Name of person who has a business relationship with local governmental entity.**

2 ☐ **Check this box if you are filing an update to a previously filed questionnaire.**

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 **Name of local government officer with whom filer has employment or business relationship.**

____

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

☐ Yes ☐ No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

☐ Yes ☐ No

D. Describe each employment or business relationship with the local government officer named in this section.

4

______________________________ ______________________________

Signature of person doing business with the governmental entity Date

Adopted 06/29/2007

	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?		