RFP for
Cazenovia College HR & Payroll System

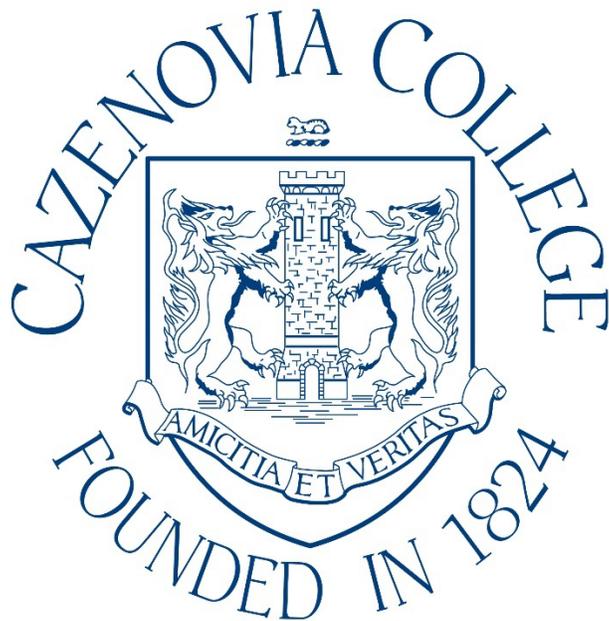# Table of Contents

General Information

Request for Proposal Notice

Notice is hereby given that the Cazenovia College will accept proposals for Payroll/HRIS services from qualified vendors. Proposals are due April 4 2022.

All questions and requests for clarification should be submitted by email to Genevieve Phillips (gmphillips@cazenovia.edu) no later than March 28, 2022. All responses will be sent to each proposer who has been mailed a copy of this Request for Proposal.

You are invited to submit your proposal for payroll/HRIS services based on the information contained in this document. Cazenovia College reserves the right to accept or reject any or all proposals and to waive formalities and select the service provider that best meet the needs of Cazenovia College and its employees. Cazenovia College objective is to select a service provider who will provide the best possible service at the best possible cost while meeting the Request for Proposal specifications. Cazenovia College is not obligated to award the contract based on cost alone.

During the evaluation process, Cazenovia College reserves the right, where it may serve Cazenovia College best interest, to request additional information or clarifications from vendors, or to allow corrections of errors or omissions. At the discretion of Cazenovia College, firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

Cazenovia College reserves to the sole right to evaluate the qualifications submitted, waive any irregularities, reject any respondent's proposals and select the firm that, in its judgment, will provide the most satisfactory service.

Timeline

RFP responses are due by April 4, 2022. Cazenovia College expects to make a vendor selection on April 18, 2022. Payroll and time and attendance services are expected to transition on July 1, 2022. The table below outlines Cazenovia College anticipated schedule. These dates are subject to change.

RFP issued	March 18, 2022
RFP due	April 4, 2022
Initial vendor meetings	April 5, 2022
Final Vendor Selection and Approval	April 18,2022
Effective date of payroll processing	July 1, 2022

Organizations awarded the business shall submit an action-plan and timetable for assuming responsibilities to Cazenovia College within 10 days of approval of the contract.

Objectives

Through outsourcing, Cazenovia College seeks to both improve service and lower costs. Lower costs could be accomplished through direct savings, reduced staff time, or a combination of the two.

In addition, we have the following objectives:

- To process payroll on time and accurately with minimal adjustments required by the employee or employer due to errors.
- To automate data collection and approval functions, so that common tasks or requests such as time entry, benefits enrollment/changes, address changes, pay changes can be entered directly by the employee or manager and approved electronically.
- To have a one-stop shop for all employment-related transactions: hiring, time and attendance, status changes, benefits, training enrollment, etc.
- To provide leaders and employees direct access to employment-related data and workforce management tools so that they can use this information in decision making.

We are looking for a solution that is:

- Intuitive to understand by administrators and end users.
- Flexible so that we can handle routine changes to our data or processes, such as adding a field, creating a report, or workflow process, with minimal outside assistance or fees.
- Reflects our complex organizational structure in a way that allows us to access or report data easily and in a variety of combinations.
- Requires limited support from IT function. Upgrades would be included as part of the service.

We are looking for a vendor that will:

- Provide best practices in HRIS implementation.
- Serve as our "specialist" and provide relevant technical and legal updates.
- Enable us to achieve automation and self service more rapidly than possible under our current arrangement.
- Provide us with an implementation team that is experienced and will assist us in making an orderly transition.
- Provide us with a reliable customer service center with experienced, informed staff that can respond to our questions within minutes. We would prefer an assigned service team.

Functional Priorities

The successful vendor will provide a Payroll, HRMS and Time Management solution. The system should also include employee and manager self-service.

Evaluation Criteria

This RFP is not intended to favor any vendor. It is solely designed to provide the best value to Cazenovia College in meeting organization needs. The evaluation team will make a recommendation to the [Insert Name] who will, in turn, present the recommendation to Cazenovia College. The evaluation team will review each proposal based on the following criteria:

Application Functionality and Provided Services
Each service provider will be asked to respond to the functionality requirements outlined in this RFP. The evaluation team will review the responses relative to the priority assigned to that functional requirement. Service providers do not have to meet every functional requirement to remain in consideration. The evaluation team may waive or modify a functional requirement at its discretion. The evaluation team will also be reviewing the general user interface of the system in terms of intuitiveness and simplicity.

Implementation Costs and Service Fees
The evaluation team will be looking for the best value in terms of both cost and service features. The evaluation team will give higher weight to service providers who can meet the functional requirements

with a standard service fee, without additional charges or implementation costs. It is also important that system upgrades are included as part of the standard service fee.

Support Services
The evaluation team will be looking for an implementation team that has experience with complex payrolls. Initial set up and training will be critical factors in our ability to deliver desired results. The evaluation team will review the support documentation provided in conjunction with the contract for service. In addition, the evaluation team will be interested in the level of support provided after the implementation period. It is important that the service provider demonstrate that they can provide trained support staff for operational concerns. It is also important that the support services provided include sharing technical/legal updates and best practices.

Level of Integration
Preference will be given to those vendors offering a fully integrated suite of products. Preference will also be given to those products that eliminate redundant entry and allow Cazenovia College to maximize the potential of employee and manager self-service. Preference will be given to vendors who are able to seamlessly interface with the current ERP or financial application.

Project Implementation
To be successful, Cazenovia College will need a strong relationship with the service provider during the implementation process. Preference will be given to those organization that show strong capabilities to implement and support all functions within the offering. Cazenovia College will also consider the implementation plan, the overall timing and duration of the project, and the technical capacity and experience of the vendor.

General Conditions and Stipulations

Indemnification and Workers' Compensation
The Proposer agrees that if the contract is awarded to their institution, the institution shall defend, indemnify and hold harmless Cazenovia College, its officials, agents, and employees from and against all claims, damages, losses, and expenses, including attorney fees, arising out of or resulting from the Proposer's acts or omission in the performance of the duties required under the contract.

Independent Contractor
It is agreed that nothing herein contained is intended or should be construed in any manner as creating or establishing the relationship of co-partners between the parties hereto or as constituting the Service Provider as the agent, representative or employee of Cazenovia College for any purpose or in any manner whatsoever. The Service Provider is to be and shall remain an independent contractor with respect to all services performed under this contract. The Service Provider represents that it has, or will secure at its own expense, all personnel required in performing services under this contract. Any and all personnel of the Service Provider or other persons while so engaged, and any and all claims whatsoever on behalf of any such person or personnel arising out of employment or alleged employment including, without limitation, claims of discrimination against the Service Provider, its officers, agents, contracts or employees shall in no way be the responsibility of Cazenovia College; and the Service Provider shall defend, indemnify and hold Cazenovia College, its officers, agents, and employees harmless from any and all such claims regardless of any determination of any pertinent tribunal, agency, board, commission or court. Such personnel or other persons shall not require nor be entitled to any compensation, rights or benefits of any kind whatsoever from Cazenovia College, including, without limitation, tenure rights, medical and hospital care, sick and vacation leave, Workers' Compensation, Unemployment Compensation, disability, and severance pay.

Audit
The Seller or other parties relevant to this agree to present an independent third-party audit of their books, records, documents, and accounting procedures and practices.

Nondiscrimination

In the performance of this contract, the Successful Proposer shall not discriminate on the grounds of or because of race, color, creed, religion, national origin, sex, marital status, status with regard to public assistance, disability, sexual orientation, or age against any of its employees, subcontractors or applicants for employment. The Successful Proposer shall include a similar provision in all contracts with subcontracts to this contract.

Miscellaneous

The proposer agrees to at all times observe and comply with all relevant laws, ordinances, regulations, and codes of the federal, state, and local government which may in any manner affect the preparation of proposals or the performance of the contract.

Instructions

Service providers can respond to the Request for Proposal by completing the information requested in Section 3: Required Vendor Information. For each question indicate how your solution satisfies the functionality defined or described as stated. If not, indicate partial functionality available. Feel free to elaborate upon customizations to your product to meet the defined or described state. If your product cannot provide functionality, please state so.

Cazenovia College Background

Overview

Cazenovia College is an independent, co-educational college near Syracuse, NY., offering graduate and bachelor degree programs in the liberal arts and professional studies in a community environment. Embracing student success as its primary mission, the College comprises a diverse yet close-knit residential community that fosters intellectual, social, and ethical growth.

Compensation

Employees are paid through an inhouse system using the Great Plains software for payroll and Time Clock Plus for time and attendance recording.

Cazenovia College has a wide variety of pay types outside of normal wages, such as:

- Full time, part time, hourly, salary, adjuncts, student workers, etc.

Generally, Cazenovia College has relatively complex pay rules that reflect the breadth of its business operations. A current list of deductions, benefits and accruals can be found in the attachments.

Benefits

Benefit eligibility is determined by employment status. Benefit eligible employees have the same health-related benefits. However, leave benefits do vary within the regular full-time and regular part-time groups. Some employees have converted to a personal time off (PTO) program while others remain on a legacy vacation/sick leave program.

Current Software

Cazenovia College uses Ellucian's Colleague software for its ERP and financial needs, as well as related support services, through Great Plains. Cazenovia College pays approximately $8000 per year for the payroll/HR and time and attendance software modules. Cazenovia College is actively using the payroll and time and attendance capabilities.

Function	Current Software	Deployed (Yes/No)
Payroll	Great Plains & homegrown timesheets	1/9/15
Time and Attendance	Time Clock Plus	
Core HR (Employee Data Management)	Great Plains	1/9/15
Recruitment	Manual	
Onboarding	Manual	
Benefits Administration	Manual	
Performance Management	Manual	
Compensation Management	Manual	
Employee Engagement	Manual	
Document Management	Manual	
Business Analytics	Manual	
Global HR	Manual	

Mobile/Table App	Manual	
Leader Development	Manual	

Roles and Responsibilities

- Payroll Specialist onboards and offboards all employees, entering all payroll information and maintaining the HRIS system. Creates a payroll notes spreadsheet for the Payroll Coordinator and Accounting Manager. We plan to have applicants/new employees enter all their own information from the application process on.
- The Payroll Coordinator pulls all data from the online timesheet system and collects hours from the Dining, Campus Services and Equine managers which they have pulled from the timeclocks and make adjustments.
- She creates a batch in GP and enters all hours for all employees to be paid. She enters all codes from Payroll Specialists notes for special payment to employees. We would like to eliminate all paper timesheets and the need for the Payroll Coordinator to have to manually enter hours.
- Payroll Coordinator creates a preview of the payroll which is reviewed by the Payroll Specialist, Accounting Manager and HR Director. Adjustments are made in the batch until approved final batch.
- Payroll Coordinator then finalizes the approved batch. We would like the following processes to be handled through the payroll system.
    - Direct deposits are sent to the bank
    - Taxes are sent to the tax preparer
    - HSA dollars are sent to HSA Bank
    - Checks and pay stubs are printed/folded and sent to the mailroom
- Accounting Manager audits payroll reports making any needed journal entries/changes.
- Payroll Specialist prints reports for 403(b) and enters them into the TIAA website and the HR Director sends final dollars to TIAA. We would like this process handled through the payroll system.
- Payroll Specialist runs report for PTO to maintains excel spreadsheets and balances against online accounts. We would like this process handled through the payroll system and PTO to show on the timeclocks/online timesheets and paychecks.
- Payroll Specialist runs report for work study hours and enters it into excel spreadsheet to track hours and dollars per semester. We would like to be enter hour limits for work study students so they are advised when they are getting close and can no longer work because they have maxed out their work study limits.
- Garnishments are processed by the AP Clerk and a check is processed and mailed. We would like this processed through payroll system.
- Benefits are processed through the AleraEdge portal, invoices are sent to Payroll Specialist, reviewed and processed for payroll through AP. Each payroll a report is printed from the portal and reviewed against the pre-noted payroll check. We would like a Ben Admin system linked to the payroll system to eliminate excess work.

Time Entry

Currently, we have several types of collection.

Online timesheet for Office staff and administration
Swiping timeclock for our Equine, Dining and Campus Services Employees.
Paper timesheets for students, part time temporary employees such as lifeguards, police academy etc.

We plan to change anyone submitting paper timesheets to either online or timeclock.

Required Vendor Information

General information

Organization information

1. *Provide a corporate overview.*

2. *Provide your philosophy, vision, and mission statements.*

3. *Describe your company's ownership.*

4. *What is the history of your company?*

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

6. *How do you distinguish yourself from the competition?*

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

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

9. *Describe your dedicated department specifically designed for your product innovation.*

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

Technology/Architecture

11. *Indicate if the product was developed by your company or purchased.*

12. *Provide an overview of your system architecture.*

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

14. *Describe how your organization provides periodic system performance evaluations for all installed applications.*

15. *How does your company stay current with technology?*

16. *How is system auditing implemented in the application?*

17. *Describe your multi-layered architecture for scalability and extensibility.*

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

Interfaces

19. *What responsibility do clients have for the design, development, testing, maintenance, and transmission of third-party service provider interfaces? What responsibility does the third-party vendor have?*

20. *Can the system interface to third parties?*

21. *Please provide us with a list of the supported APIs.*

Product deployment

22. **Do you offer your products as Licensed, Hosted, SaaS or all three?**

23. **If you offer a Hosted and/or a SaaS solution, what is the data center and network infrastructure?**

24. **If you host the application, what types of technical resources are required?**

25. **Describe your software development lifecycle.**

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

27. **If Hosted and/or SaaS, what control would we have with making application modifications- screens, tables and fields?**

Security

28. **Describe your approach to system security.**

29. **If data centers are physically secured, explain the method/technology used. For example are they Tier IV?**

30. **What is the standard rule base for incoming/outgoing traffic enforced by the Firewall?**

31. **What virus detection/scanning mechanisms are in place?**

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

33. **What happens when the system is accessed by someone without rights? What password authentication controls are utilized?**

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

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

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

37. **The vendor should also provide a SOC 2 report yearly to ensure that the company safeguards customer data and how well those controls are operating.**

Application security

38. **Describe the proposed system's application level security.**

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

40. **Does the proposed application support single sign on?**

41. **Is your security roles based or user based?**

42. **How are the users and security roles administered?**

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

44. *Can users have more than one security profile?*

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

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

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

Human resources

General

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

2. *Who has responsibility for maintaining customization changes?*

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

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

5. *Does the system have data archiving capabilities?*

6. *Explain your system's workflow capability (i.e.: approve/not approve).*

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

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

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

Organization information

10. *Can we configure organizational structures by division, location, functional groups (i.e., corporate is finance, accounting, legal, human resources making up one group), departments?*

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

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

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

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

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

Talent acquisition

Recruitment

1. **Provide a recruiting solution overview.**

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

3. **How are candidates managed during the recruiting process?**

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

5. **Can the job posting be customized?**

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

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

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

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

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

11. **Does it allow an applicant to be a candidate for multiple requisitions?**

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

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

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

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

Employee termination

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

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

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

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

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

21. *Can we archive terminated employee information indefinitely?*

Benefits

1. *Does your system handle benefits administration?*

2. *Describe the integration between benefits and payroll.*

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

4. *Describe the system capabilities for online benefits enrollment.*

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

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

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

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

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

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

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

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

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

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

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

16. *Describe employee self-service access for benefits enrollment.*

17. *How can employees manage dependent data in the system?*

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

Affordable Care Act (ACA)

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

2. *Describe your ability to forecast costs.*

3. *Does your system allow for hours tracking hours per pay period for both initial and standard measurement periods?*

4. *Can your system simultaneously measure an employee in both a standard and initial measurement period?*

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

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

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

Employee self-service

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

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

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

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

5. *Can employees' access company-level documentation?*

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

7. *How do employees view and access benefits information?*

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

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

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

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

Manager self-service

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

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

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

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

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

Document management

1. *Describe your document management capabilities.*

2. *What formats are accepted/recognized?*

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

4. *How can documents be searched?*

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

Payroll

General payroll

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

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

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

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

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

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

7. *Describe the check voiding process.*

8. *How do you handle imputed income?*

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

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

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

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

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

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

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

16. *Describe the manual check process.*

17. *Administrators can immediately view the complete zero-to-net impact of changes made to time records.*

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

19. *Supports an unlimited number of earning and deduction definitions.*

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

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

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

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

Tax

24. *Do you provide full tax filing processes?*

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

26. *Do you support one time additional tax amounts and/or overrides?*

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

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

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

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

General ledger interface

31. *Describe your general ledger interface process.*

32. *Please describe how the proposed system will support multi-tier labor allocations to post actual employee cost to GL. This includes the allocation of wages, employee and employer taxes, and employee and employer deductions by multiple organizational levels.*

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

34. *Can data be exported to excel for editing capabilities?*

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

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

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

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

39. *Will adjustments be automatically posted to GL? Explain.*

Time and attendance

General

1. *Describe your time and attendance capabilities.*

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

3. *How does the system enforce access control?*

4. *Is data viewed and available in real time?*

5. *Who can define access control rules?*

6. *Describe the approval process within your application?*

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

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

9. *Are employees able to access prior period information?*

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

11. *Is an audit trail of any edits kept?*

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

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

14. *Describe how your application can support Labor Distribution.*

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

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

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

18. *How does your system handle predefined Holidays?*

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

Schedules

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

21. *Can an employee's timecard be prepopulated from their schedule?*

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

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

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

25. *Explain options for scheduling employees based on skills, certifications, seniority, availability, preferences, etc.*

Approvals

26. *Describe the timecard approval process within your application.*

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

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

Overtime and pay rules

29. **Describe how your system supports wages & various overtime rules.**

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

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

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

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

Time off/Leaves of absence

34. **Please explain your time off tracking capabilities.**

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

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

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

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

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

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

41. **Can your system accommodate FMLA tracking?**

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

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

Reporting

1. **Please describe your reporting functionality.**

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

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

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

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

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

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

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

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

Business analytics

1. *Describe your capability to support data analytics dashboards.*

2. *How does your solution help employers better ensure diversity and inclusion across their organization?*

3. *Does your software support customizable dashboards?*

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

5. *Is access to analytic dashboards controlled by role based security?*

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

7. *Reporting and analytics data visibility respects the configured security model.*

Implementation

1. *Provide an overview of your implementation methodology phases.*

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

3. *What differentiates your implementation approach from other vendors?*

4. *How many parallel runs do you perform?*

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

Account management

1. *What is your customer service model?*

2. *Please describe your service delivery team.*

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

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

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

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

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

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

Training

1. *What types of training do you offer customers?*

2. *What training materials do you provide?*

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

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