

EXHIBIT A

The definitions are as follows:

- R** Required
P Preferred

Codes:

- SD** Requirement is standard to application software no modification needed.
MC Application software will satisfy this requirement with moderate modification (to be accomplished within 2days)
SC Significant customization (beyond 2 days) is needed to satisfy the requirement. Where a specific requirement cannot be fully met, or an alternative solution is proposed, comments should be included (i.e. the cost of basic tailoring, how much time is needed, etc.)

RECRUITING, APPLICANT TRACKING:

No.	Description	R	P	Code	Comments
Requisition & Position Control					
1.	Human Resources and/or hiring managers can create a requisition	X			
2.	Help fields are provided for hiring managers that may need help to create a requisition	X			
3.	Hiring managers can delegate responsibility to another hiring manager (i.e. vacation, change of hiring manager)		X		
4.	A requisition can be created for internal only recruitment. HR has the ability to design/change workflow and steps of the process	X			
5.	A requisition can be created for external recruiting. HR has the ability to design/change workflow and steps of the process	X			
6.	Requisitions can be electronically routed for approvals	X			
7.	Requisition can be approved by HR if the requisition is stalled in the approval process so that it can be moved forward, even if approvals are pending	X			
8.	System has email workflow capability and template capability	X			
9.	System allows for a hiring manager, recruiter, department, location, etc. to be changed once a requisition is approved or open	X			
10.	System tracks this change (see above)	X			
11.	System tracks applicants when a position is cancelled, closed, filled, etc.	X			
12.	System tracks all positions (filled, open, closed, cancelled, etc.) with ability to sort by categories	X			
13.	Allows users to e-mail potential interview times, applications, corporate material, job opening status.	X			
14.	Distinguishes applicant/candidate status for internal or external candidates.	X			
15.	Candidate record has all the associated recruiting activity regardless of requisition	X			
16.	Allow HR to search for resume/applicant by keywords	X			
17.	Allows applicants/candidates to modify or replace their existing resume.	X			
18.	Allows HR/Hiring managers to enter and access secure notes.	X			
19.	System provides an automated process for job posting	X			
20.	HR can create a job posting from an existing/previous requisition or from scratch	X			
21.	System has templates for posting similar jobs as opposed to posting from scratch (i.e. copy existing jobs, choose from template)	X			
22.	HR can choose or select internal or external when posting a job requisition	X			

RECRUITING, APPLICANT TRACKING (Cont'd.):

No.	Description	R	P	Code	Comments
23.	HR can choose or select posting for outside advertising built into the ATS (i.e. CareerBuilder, Indeed, LinkedIn)	X			
24.	Internal only positions can be posted on our Intranet (employees only). All other positions can be posted on the Internet (Horizon's website)	X			
25.	Postings can have automatic close dates.	X			
26.	Closed postings can be re-posted and edited.	X			
27.	System has a resume builder as well as the "cut and paste" feature for resume entry for applicants. Both options are available to both internal and external applicants.	X			
28.	System allows for different document types for uploading resumes (i.e. PDF, Word, etc.)	X			
29.	System has functions of "Job Agents" for all applicants. Applicants can set criteria for auto emailing of recently posted jobs that fit their interest	X			
30.	Time zone of where system servers are located does not affect the hour the postings are automatically removed (automatic closing)		X		
31.	System clearly differentiates internal staff versus external candidates within the ATS	X			
32.	Information is saved for applicants applying for a job or editing their profile and they can save and come back at a later time without losing information.	X			
33.	System allows candidates to apply to multiple jobs without overwriting any existing submitted applications.	X			
34.	System allows applicants to be routed to a single email address/hiring manager or a pre-determined group of email addresses	X			
35.	System provides advertising capabilities directly from the ATS and integrates with job boards	X			
36.	Provides ability to automatically notify other areas of organization of new hire (security, payroll, etc.)		X		
37.	Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.	X			
38.	Applicants can view their application status (i.e. reviewed, not reviewed, does not meet minimum qualifications, etc.).	X			
39.	Applicants receive an automated email as their application is routed to various statuses (i.e. reviewed, not reviewed, does not meet minimum qualifications, interview requested). HR can set templates for each status email.	X			
40.	Applicants can get on-line assistance when applying or creating their profile		X		
41.	Applicants can be tagged for response letters, system generates appropriate and timely letters, notifications or emails	X			
42.	System has interview scheduling and communication capabilities using email and MS Outlook	X			
43.	System has capability to do "keyword search" for applicants with a certain skill set	X			
44.	Recruiters can tie late applicants to a closed position for history purposes	X			
45.	Applicant can withdraw from particular positions for which they applied through their own portal access	X			
46.	Applicant process allows for storage of questionnaires and assessments	X			
47.	Each applicant's job application history is stored and able to be reviewed in one central location versus attached to individual requisitions	X			
48.	Multiple profiles can be merged by HR	X			
49.	External applicants who apply, and are hired, show as internal employee for future opportunities. System updates the profile, but does not destroy history	X			

RECRUITING, APPLICANT TRACKING (Cont'd.):

No.	Description	R	P	Code	Comments
50.	HR or Hiring Manager can write notes about an applicant which remain in the applicant file for internal purposes online (i.e. barrier crime listed on application, will meet qualifications 2017).	X			
51.	HR can flag an applicant as not eligible for rehire. Flag remains on file until after removed by HR	X			
52.	System allows for applicant status updates to hiring managers or reverse, to recruiters with-in the system. System allows for managers to request information from recruiter/HR through system	X			
53.	Applicants can store multiple resumes and recruiters and hiring managers only see the one that has been submitted by the applicant for a particular position.	X			
Onboarding Forms		R	P	Code	Comments
54.	System has the capability to electronically assign onboarding/new hire forms to hired candidates	X			
55.	System allows candidates to electronically complete the onboarding forms and provides technological assistance	X			
56.	System has a predetermined selection of onboarding forms and allows for customized forms to be built and included	X			
57.	System allows for HR to determine which forms are required for each candidate	X			
58.	Electronic onboarding forms are routed to HRIS automatically upon completion and stored in the electronic employee file with updated data fields	X			
Employee Referrals		R	P	Code	Comments
59.	System allows for applicants to list referring employees on their application.	X			
60.	Referrals for hired employees can be brought over into the HRIS System and flag the referring employee for payment of referral bonuses automatically.	X			
61.	The system distinguishes employee referrals from regular applicants	X			
Administration		R	P	Code	Comments
62.	System provides a "note" field under the requisition for recruiters' notes. Recruiter notes are not visible to hiring managers or applicants	X			
63.	System allows for set-up and change of departments and divisions for posting purposes	X			
64.	System has capability for the creation and use of applicant questionnaires and scoring. Emails can be triggered based on knock out or no fit of applicants	X			
65.	Job descriptions can be uploaded into the system from Halogen for job postings and can be edited once uploaded	X			
66.	System allows for the use of the Online Consent Agreement and EEO voluntary entries for AA reporting	X			
67.	System capabilities include on-line pre-employment screening forms to be completed by applicant and there is storage of these forms				
68.	System capabilities include on-line offer letters and new hire forms for completion and storage within HRIS. Offer letters can be created and edited by HR.	X			
69.	System supports or integrates with pre-screening background service companies		X		
70.	System utilizes on-line e-signatures for background check consent	X			
71.	System has default time out period for applicant entry, but time frame for timing out can be changed		X		

No.	Administration (Cont'd.)	R	P	Code	Comments
72.	Vendor will migrate data from existing ATS to new system as part of implementation	X			
73.	System tracks where applicants fall out of the process with reason codes why (i.e. did not meet basic qualifications, did not respond to repeated phone calls, took another position, etc.)	X			
74.	System automatically saves previous versions of applicant's data (if they change or edit application/profile)	X			
75.	System capabilities include automated way to determine if applicant meets "basic qualifications" such as on-line questionnaires where applicant can self-qualify		X		
76.	System offers preset list of reports and offers a report writing	X			
77.	System has standard metric reports such as time to fill, cost per hire, etc.	X			
78.	System can generate vacancy reports	X			
79.	System has workflow reporting for requisition approvals (shows where the delay may be occurring)		X		
80.	System has reports for referral source including advertising effectiveness	X			
81.	System has an easy-to-use reporting tool/software	X			
82.	Reports can be updated/saved and other HR users can access these saved reports		X		
83.	Workflow approvals can be tracked and reported on		X		
	Ad-Hoc Reporting	R	P	Code	Comments
84.	System allows for user to choose fields to report/extract data	X			
85.	System has standard report output formats	X			
86.	System allows for user to define select criteria for ad-hoc reporting	X			
87.	Standard report export formats are supported (CSV, XLS, PDF, etc.)	X			
88.	System allows for calculated fields and subtotaling	X			
	Supported Browsers	R		Code	Comments
89.	All browser versions/types are supported	X			
90.	System has no (or few) software or hardware incompatibilities or conflicts	X			
	Security Administration	R	P	Code	Comments
91.	System utilizes user id / passwords	X			
92.	Candidate can request a password reset from the vendor. HR also has capability to reset passwords				
93.	System has/requires network security	X			
94.	Integrates with all applications in this RFP without the use of a third party	X			

TERMINATION:

No.	Requirement	R	P	Code	Comments
95.	Enables manager self-service request for termination workflow.		X		
96.	Tracks terminations by reason (e.g. discharged, better opportunity, etc.), date, rehire eligibility, COBRA election.		X		
97.	Can the termination workflow be different based on the termination reason, or other termination criteria?		X		
98.	Maintains exit interview information.		X		
99.	Can automatically cancel specified employee benefits upon termination.		X		
100.	Provide on-line support/instructions for completion of routine tasks.	X			

TERMINATION (Cont'd.):

No.	Requirement	R	P	Code	Comments
101.	Establish new organizational entities (e.g., companies, cost centers, and other variables) with no IT or programming required.	X			
102.	Add/change organizational entities and easily/effectively transfer employees within and/or across them.	X			
103.	Maintain employee demographic data for all employment-related details (e.g., birth date, employee number, gender, hire date, contact information).	X			
104.	Maintain ethnic, visa, and I-9 related data.	X			
105.	Maintain marital, family, and dependent/beneficiary related and tax-related elections.	X			
106.	Maintain historical data for current/former employees (e.g., names, employment, job/assignments, performance ratings, status, and pay).	X			
107.	Maintain audit trails of employee file and data updates by date, time, and origin of update.	X			
108.	Generate, identify, and track employees by unique employee number.	X			
109.	Maintain language, education, and certification data.	X			
110.	Establish jobs/roles/positions and all relevant details.	X			
111.	Maintain data for all job-related details (e.g., grade, exemption status, EEO code, salary, job family).	X			
112.	Make simultaneous changes to large employee groups (e.g., new hires, salary changes, transfers).	X			
113.	Enable effective/future dating of pending transactions/events, and maintain transaction history.	X			
114.	New hires automatically routes approval based on company's hierarchy.	X			
115.	Routes job/salary changes electronically for approval based on user defined approvals.	X			
116.	E-mail alerts can be generated based on system or user defined events.	X			
117.	Life-to-date history on all employee fields.	X			
118.	Audit trails for all additions, updates and changes.	X			
119.	Retains employee status code history.	X			
120.	No limit to historical data captured.		X		
121.	Unlimited user defined fields.		X		

COMPLIANCE:

No.	Requirement	R	P	Code	Comments
122.	Changes to compliance requirements are maintained and updated by HRIS vendor.	X			
123.	All compliance reporting can be generated for current periods and historical periods.	X			
	Standard compliance reports include:				
124.	EEO-1	X			
125.	OSHA 300 and OSHA 301	X			
126.	Multi-Worksite Reports	X			
127.	Vets-100	X			
128.	Automatic notification of I-9 expiration/visa expiration.	X			
129.	COBRA letters can be generated from the system.		X		
130.	Tracks any accommodations made to support the American with Disabilities Act (ADA).	X			
131.	Tracks ADA and disability information.	X			
132.	Provides military and veteran status for employees.	X			
133.	Includes affirmative action compliance features.		X		
134.	Provides HIPAA support.		X		
135.	Provides worker's compensation support.		X		

COMPLIANCE (Cont'd.):

No.	Requirement	R	P	Code	Comments
136.	Creates separate, mandated government reports for each individual tax entity.		X		
137.	Includes state-mandated "New Hire" reports (for child support payment tracking).	X			
138.	Updates from HRIS vendor when federal/state/local regulations change.	X			

PERFORMANCE APPRAISAL:

No.	Requirement	R	P	Code	Comments
139.	Integrates with external performance management system and succession management applications and processes (Halogen Software).	X			
140.	Integrates with external learning management system and succession management applications and processes (e.g., learning plans/career planning).		X		

BUDGET:

No.	Requirement	R	P	Code	Comments
141.	Human Resources can view summary data and analyze salary budget information by departments.	X			
	Human Resources can assign salary increases based on:				
142.	Dollar amounts	X			
143.	Percentages	X			
144.	Combination of dollar and percentages	X			
145.	Human Resources can create "what if" employee scenarios to ensure that increases do not exceed the department salary budget.	X			
146.	Human Resources can apply "across the board" salary increases for a department.	X			
147.	Human Resources can allocate different percentages and/or dollar amounts to different employees.	X			
148.	Assign multiple salary increases to one employee (i.e., cost of living and merit increases).	X			
149.	Rate changes and increases are effective-dated for payroll processing.	X			
150.	Human Resources can plan for compensation, overtime, taxes and benefits.	X			
151.	Human Resources can utilize advanced functions to calculate benefits (nested if/then statements, etc.)		X		
152.	Human Resources can plan for pre-tax benefits.	X			
153.	Human Resources can set budget using FTE or Headcount.	X			
154.	Human Resources can plan for terminations, leaves, and new hires.	X			
155.	Human Resources can plan for transfers between locations, departments and sections.	X			
156.	Human Resources can plan for temporary, part time, half time employees.	X			
157.	Human Resources can plan for temporary employees from an outside agency.	X			
158.	Human Resources' view of budget can be set to limit to departments/offices.	X			
159.	Budget Data can be exported to excel.	X			

BUDGET (Cont'd.):

No.	Requirement	R	P	Code	Comments
160.	Current and prior year payroll data is accessible in the budget planning module.	X			
161.	Human Resources can generate variance reports to compare budget to actual expense.	X			
162.	System maintains historical budget records.		X		
	System has reporting capabilities:				
163.	Location	X			
164.	Department	X			
165.	Title	X			
166.	Section of Law	X			
167.	Status	X			
168.	Compensation Only	X			
169.	Benefits & Taxes Only	X			
170.	Employee versus Employer Expense	X			

EMPLOYEE EVENTS:

No.	Requirement	R	P	Code	Comments
171.	Maintains multiple education information per employee such as schools attended, dates of attendance, degrees, and course of study.	X			
172.	Does the system track the following data?	X			
173.	Skill code	X			
174.	Skill description	X			
175.	Experience level	X			
176.	Proficiency level	X			
177.	Last date skill used	X			
178.	Tracks employee licenses and certification and expiration dates.	X			
179.	Tracks employee professional associations. Specify limit.	X			

OSHA and SAFETY:

No.	Requirement	R	P	Code	Comments
180.	Maintains OSHA logs at the employee level.		X		
181.	Can view a summary page/window showing all incidents for an employee.		X		
182.	Can view the detail of an individual employee incident.		X		
	Incident details include:				
183.	Accident or exposure itself		X		
184.	Date and time		X		
185.	Days away from work		X		
186.	Days of restricted work		X		
187.	Illness or injury		X		
188.	Complete incident description		X		
189.	Ability to add notes.		X		
190.	OSHA reports are included as standard reports (OSHA 300, and OSHA 301).	X			
191.	All incident history is maintained indefinitely.	X			
192.	Incident information and history are accessible through reporting.	X			

BENEFITS:

No.	Requirement	R	P	Code	Comments
193.	Provides total integration between benefits and payroll	X			
194.	Maintain calculations and limits in compliance with federal legislation.	X			
195.	Assigns different benefit packages to different groups of employees based on eligibility rules.		X		
196.	Establishes benefit/deduction plans with multiple types and options.	X			
	Supports effective dated:				
197.	Benefit/deduction plans	X			
198.	Employee benefit/deduction plan enrollment	X			
199.	Employer benefit/deduction plan enrollment	X			
200.	Updates benefit/deduction plans based on employee status change.		X		
201.	Tracks "waived" benefit/deduction plans.	X			
202.	Assigns a rate schedule to apply new rates with future effective dates for the new plan year.	X			
203.	Without writing a separate program, automatically updates premiums for age/salary driven benefit calculations.		X		
204.	Automatically enrolls employees in required plans.	X			
205.	Automatically cancels specified employee benefits upon termination.	X			
206.	Allows benefit costs to be set up for the new year while continuing processing for the current year.	X			
207.	Tracks and maintains information for dependents and beneficiaries.	X			
208.	Calculates imputed income.	X			
209.	Tracks workers' compensation claims.		X		
210.	Facilitates reporting to third-party vendors such as benefit providers.	X			
211.	Provides one screen that shows employee data ("benefits-at-a-glance"), without having to scroll through multiple screens.		X		
212.	Defines and maintains benefit/deductions for the employee and employer	X			
213.	Includes automated schedules for benefits/deductions.		X		
214.	Supports benefit/deduction goals and limits.	X			
215.	Supports "catch up" contributions on deferred compensation plans.	X			
216.	Recovers benefit/deduction amounts that have been put into arrears.		X		
217.	Supports multiple arrear types.		X		
218.	Includes defined start and stop dates for benefit/deduction.		X		
219.	Processes one-time benefit/deductions.		X		
220.	Restricts participants from receiving more than the annual limit for reimbursement accounts including 403(b) and 401(k).	X			
221.	Includes pre-tax and post-tax benefits/deductions.	X			
222.	Supports a designated default amount for each deduction code.	X			
223.	Supports multiple types of life insurance, long term disability, and short term disability.	X			
224.	Supports flexible spending accounts (FSA).		X		
	Display flexible spending account information such as:				
225.	Plan information		X		
226.	Balance of funds in account (s)		X		
227.	History of transactions for reimbursements		X		
228.	Maintains updated FSA balance.		X		

OPEN ENROLLMENT:

No.	Requirement	R	P	Code	Comments
229.	System provides next-year enrollment capability while in current year.	X			
	From a Web browser, employees can:				
230.	View current benefits and related information.	X			
231.	Compare current benefits to the new benefits employees may choose to elect.	X			
232.	Compare the cost of current versus new benefits.	X			
233.	Make benefit elections from a list of eligible benefits.	X			
234.	Keep existing benefit elections with no changes.	X			
235.	Modify existing benefit elections.	X			
236.	Make new benefit elections to replace existing benefits.	X			
237.	Waive or decline benefits.	X			
238.	Review, add, modify and remove dependents and beneficiaries.	X			
239.	Review benefits and summary description documents.		X		
240.	Link to benefit plan provider Web sites for additional information to help in making informed benefit and provider choices.		X		
241.	Save "in progress" enrollments and then later return to modify choices, make additional elections and complete the enrollment process.	X			
242.	Make life event (e.g., baby, marriage) benefit changes.	X			
	From a Web browser, Benefits Manager can:				
243.	Describe benefit plans and include specific plan details.		X		
244.	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).		X		
245.	Specify the display order in which each benefit plan is viewed by the employee.	X			
246.	Identify required and optional activities that designate an active versus passive enrollment.	X			
247.	Limit the number of dependent relationships to the employee for each benefit plan offered.	X			
248.	View the statuses of all enrollments.	X			
249.	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.	X			
250.	Add or modify employee elections.	X			
251.	Send due date reminders using an integrated e-mail feature.		X		
252.	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).		X		
253.	Create Internet links to benefit plan provider Web sites so employees can obtain additional details to help them make informed choices.		X		
254.	Attach enrollment worksheets for employees to use when making life event benefit changes.		X		
255.	Report and track benefits-related information and activities as they relate to new hires, benefit group changes, dependents, session setup, employee elections, and terminations.	X			
256.	Export employee enrollment data (e.g., 401(k) 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.	X			
257.	Supports default benefits which can be set up for new hires.	X			

OPEN ENROLLMENT (Cont'd.):

No.	Requirement	R	P	Code	Comments
258.	Supports unique enrollment dates for each benefit plan.	X			
259.	Provides a next year enrollment capability.	X			
260.	Provides ability to report life event (e.g., marriage) and allow "eligible" changes to benefit elections.	X			
261.	Allows updates to dependent information for life events.	X			

LIFE EVENTS:

No.	Requirement	R	P	Code	Comments
262.	Allows online enrollment form for employees to use when making life-event benefit changes.	X			
263.	Supports life events processed through the employee self-serve function of the system.	X			
264.	Provides online ability to make life event changes (marriage, birth of a child, death, divorce).	X			
265.	Automatically prompts "eligible" changes to benefit elections when life event change made.	X			
266.	Allows update to dependent information for life events.	X			
267.	Allows removing a dependent.	X			
268.	Alerts student status end date to employee & employer		X		
269.	Allows update address changes.	X			
270.	Allows change in marital status.	X			

LEAVE ADMINISTRATION:

No.	Requirement	R	P	Code	Comments
271.	Supports leave types	X			
272.	Supports maximum duration of leave types and combined leaves, i.e. FMLA to PL, etc.	X			
273.	Tracks due dates of Certification of Healthcare Provider Form by associate		X		
274.	Tracks the approved date when the associate's leave of absence is expected to start.		X		
275.	Tracks the approved date when the associate is expected to return from the leave.		X		
276.	Tracks and reports cumulative FMLA/PL time taken.		X		
277.	Maintains leave of absence history.	X			
278.	Calculates the planned duration, based on expected end and expected start dates.		X		
279.	Supports workflow approval processes for leave requests initiated by employees or managers.	X			
280.	Displays warning message during pay processing if time entered exceeds the leave balance.	X			

PAID TIME OFF (PTO), VACATION, PERSONAL DAY, SICK:

No.	Requirement	R	P	Code	Comments
281.	PTO accruals and leave administration can be processed without Time and Attendance feature.	X			
282.	PTO plans can be configured for a lump sum accrual on an annual basis.	X			
283.	PTO plans can be configured to accrue based on length of service and user defined rates.	X			

PAID TIME OFF (PTO), VACATION, PERSONAL DAY, SICK:

No.	Requirement	R	P	Code	Comments
	PTO plans can be configured to accrue based on user-defined frequencies.				
284.	Per number of days	X			
285.	Per number of weeks	X			
286.	Per number of months	X			
287.	Per number of years	X			
288.	Per fixed date	X			
289.	Per included hours	X			
290.	Per included earnings	X			
291.	Per pay period	X			
292.	Per customer defined rules	X			
293.	PTO plans can be configured to adhere to user-defined carryover rules.	X			
294.	Supports unlimited types of leave.	X			
295.	Tracks the approved date when the employee's leave of absence is expected to start.	X			
296.	Tracks the approved date when the employee is expected to return from the leave.	X			
297.	Maintains leave of absence history.	X			
298.	Calculates the planned duration based on expected end and start dates.	X			
299.	Employees can view PTO/leave plan balances.	X			
300.	Employees can request PTO/leave.	X			
301.	Manager can view PTO/leave plan balances.	X			
302.	Managers can view pending employee PTO/leave requests.	X			
303.	Manager can request PTO/leave.	X			
304.	Workflow approval processes are included for PTO/leave requests initiated by employees or managers.	X			

FLEXIBLE SPENDING ACCOUNT (FSA):

No.	Requirement	R	P	Code	Comments
305.	Supports employee enrollment.	X			
306.	Enrolls employees in FSA/HSA plans through benefits open enrollment.	X			
307.	Maintains two open plan years so reimbursements can be paid from one year, while beginning claims processing for the new benefit year.	X			
308.	Restricts participants from receiving more than the annual contribution election limit for reimbursement accounts.	X			

COBRA:

No.	Requirement	R	P	Code	Comments
309.	Defines employee's COBRA status, date of qualifying COBRA event, description of COBRA event, and date the COBRA notification letter was sent.		X		
310.	Defines dependent's COBRA status, date of qualifying COBRA event, description of COBRA event, and the date the COBRA notification letter was sent.		X		
311.	Automatically captures COBRA information during the termination process		X		
312.	Automatically generates COBRA notifications.		X		
313.	Create COBRA notification letters and invoices.		X		
314.	Exports all employee and dependent COBRA information to a third party COBRA administrator.		X		
315.	Generates COBRA billing documents		X		
316.	Maintains COBRA payment history		X		

POSITION MANAGEMENT:

No.	Requirement	R	P	Code	Comments
317.	Provides position management reports by different organizational levels.	X			
318.	Tracks headcount and full time equivalents (FTE) associated with positions.	X			
319.	Tracks multiple position assignments for an employee.	X			
320.	Calculates FTEs in multiple ways.	X			
321.	Stores unlimited history of changes recorded to the position record.	X			
322.	Tracks unlimited history of changes to employee position assignments.	X			
323.	Records information for replacement planning, indicating possible new positions for employees.		X		
324.	Integrates with recruitment and staffing feature for establishing requisitions.	X			
325.	Supports the generation of organization charts based on position "reports to" hierarchy.		X		
326.	Tracks status of position approval.	X			
327.	Allows overstaffing for positions.	X			
328.	Prohibits assignments to a position if overstaffing is not allowed.		X		
329.	Allows position codes in the GL distribution.	X			
330.	Allow the allocation of employee pay by position code automatically or manually.	X			
331.	Assigns position number manually or automatically.	X			
332.	Provides on-line position incumbent data.	X			
333.	Provides on-line prior position incumbent data.	X			
334.	Indicates budget period.		X		
335.	Maintains approved budget by position including dollars, hours and FTEs.		X		
336.	Tracks current budget accumulators and provides on-line views.		X		
337.	Tracks budget variances.		X		
338.	Maintains multiple budget plan years on-line.		X		
339.	Standard reports that assess budgeted vs. actual FTE's and dollar amounts.		X		

PAYROLL:

No.	Requirement	R	P	Code	Comments
340.	Ensures payroll system reflects appropriate earnings and deduction codes based on company benefits and compensation structures.	X			
341.	Allows system to be set-up to receive and manage company initiatives such as United Way or other charitable giving.	X			
342.	Provides online help in application for end-users.	X			
343.	Provides online help in application for administrators.	X			
344.	Provides "wizards" to walk users through completing tasks.	X			
345.	Provides a "test" system for customers to test new features and potential changes.	X			
346.	Provides a "test" system for customers to use for internal training.	X			

EARNINGS:

No.	Requirement	R	P	Code	Comments
347.	Provides an unlimited number of earnings codes	X			
348.	Pays various earnings types (e.g., severance or bonus) after an employee is terminated on system.	X			
349.	Provides automatic gross up calculation for earnings.	X			
350.	Allocates earnings by different organizational levels.	X			
351.	Delivers all federal, state and local earnings tax categories.	X			
352.	Calculates and initiates off-cycle/special payments (e.g., signing bonus, annual bonus).	X			
353.	Delivers an expression builder to create company specific earnings calculations.	X			
354.	Allows for earnings to be scheduled in the payroll calendar.	X			
355.	Specifies start and stop dates for earnings.		X		
356.	Differentiates which earnings to include/exclude from other calculations (e.g., shift, deferred compensation).	X			
357.	Earnings codes can be specific for different types or groups of employees (e.g., part time or executive).	X			
358.	Tracks YTD amounts, by earnings type, for unlimited number of years in check detail history.	X			
359.	Tracks YTD hours worked, by hours type, for unlimited number of years in check detail history.	X			
360.	Supports the calculation of taxable fringe benefits.	X			
361.	Supports the calculation of imputed income.	X			
362.	Provides ability to enter non-taxable reimbursements.	X			
363.	Handles employees with multiple rates of pay.	X			
364.	Calculates various shift premiums.	X			
365.	Accurately pays shift premium for employees who work multiple shifts.	X			
	Overtime calculations include:				
366.	Half time		X		
367.	Time and a half	X			
368.	Double time		X		
369.	Triple time		X		
370.	Calculates co-efficient overtime on the payroll input screen.	X			
371.	Distinguishes between regular and premium wages for workers' compensation.	X			
	Automatically accumulates hours and earnings by:				
372.	Fiscal year-to-date	X			
373.	Year-to-date	X			
374.	Quarter-to-date	X			
375.	Month-to-date	X			
376.	Last payroll	X			
377.	Employees can view YTD earnings through employee self - service.	X			
378.	Define hours per week by employee or job level.	X			
379.	Is file ID# unique - i.e. no instances where a new number needs to be reassigned a new number regardless of entity	X			

DEDUCTIONS/BENEFITS:

No.	Requirement	R	P	Code	Comments
380.	Provides an unlimited number of deduction codes.	X			
381.	Delivers all federal, state and local deduction/benefit tax categories.	X			
382.	Accommodates one time deductions.	X			
383.	Delivers an expression builder to create company specific deduction calculations.	X			
384.	Allows for deductions to be scheduled in the payroll calendar.	X			
385.	Allows client-defined prioritizing of deductions.	X			
386.	Allows attachment of goal limits to deduction codes.	X			

DEDUCTIONS/BENEFITS (Cont'd.):

No.	Requirement	R	P	Code	Comments
387.	Supports start and stop dates for deductions.	X			
388.	Automatically cancels specified employee deductions upon termination, based on company business rules.	X			
389.	Supports effective dating with deductions.	X			
390.	Includes a rate table at the company level for benefit deduction amounts, so they are not manually entered on each employee.	X			
391.	Deduction cost can be entered for the new plan year, while continuing processing for the current year	X			
392.	Deduction codes can be specific for different types or groups of employees (e.g., part time or executive).	X			
393.	Tracks YTD amounts, by deduction type, for unlimited number of years in check detail history.	X			
394.	Allocates deductions by multiple organizational levels.	X			
395.	Maintains unlimited history of all deduction changes.	X			
	Automatically accumulates deductions by:				
396.	Fiscal-year-to-date	X			
397.	Year-to-date	X			
398.	Quarter-to-date	X			
399.	Month-to-date	X			
400.	Last payroll	X			
401.	Allows employees to view YTD deductions through employee self-service.	X			
402.	Ability to temporarily override deduction amounts	X			
403.	Allows temporary inactivation of deductions at the employee level one-time or on an on-going basis	X			
404.	Allows temporary inactivation of deductions at the company level to affect all employees	X			

WAGE GARNISHMENT:

No.	Requirement	R	P	Code	Comments
405.	Provides a fully integrated, wage garnishment administration that is full service	X			
406.	Calculates garnishments based on the state, federal, and/or calculation rulings and withholding limits	X			
407.	Stores other relevant garnishment data at the deduction level (e.g., case number, payee).	X			
408.	Delivered logic to properly calculate multiple garnishments.	X			
409.	Allows attachment of goal limits to individual garnishments.	X			
410.	Allows assignment of start and stop dates for individual garnishments.		X		
411.	Provides printing of checks payable to garnishors		X		
412.	Allows designation to automatically send payment checks directly to the garnishor or to the employer for time specific delivery	X			
413.	Wage garnishment service maintains historic records of garnishments for an unlimited number of years	X			

CALCULATING PAY:

No.	Requirement	R	P	Code	Comments
414.	Supports unlimited earnings, deductions and tax codes.	X			
415.	Supports different types of income.	X			
416.	Supports employees with multiple rates of pay and department/cost center assignments.	X			
417.	Tracks employees with multiple pay rates and departments/cost center assignments.	X			
418.	Maintains and updates overtime and pay specific rules including state specific rules.	X			
419.	Supports automatic retroactive pay calculations and payments.	X			
420.	Enables date-driven salary changes (allowing past and future changes).	X			
421.	Allocates by different organizational levels and/or projects.	X			
422.	Calculates shift differentials and job premiums automatically.	X			
	Automatic calculations				
423.	Performs gross to net calculations per employee per check and are immediately viewable.	X			
424.	Calculates and initiates off-cycle and special payments (e.g., signing bonus, annual bonus).	X			
425.	Provides automatic gross up calculation for earnings.	X			
	<i>Overtime calculations include:</i>				
426.	Half time		X		
427.	Time and a half	X			
428.	Double time		X		
429.	Triple time		X		
430.	Guaranteed overtime (e.g., paid overtime for working Saturday even if normal work week does not exceed 40 hours)		X		
	<i>Customer can override an employee's pay check by entering or changing:</i>				
431.	Tax frequency	X			
432.	Method of payment (check vs. direct deposit)	X			
433.	Rate of pay	X			
434.	Shift codes – How many are allowed?	X			
435.	Hours	X			
436.	Earnings	X			
437.	Deductions	X			
438.	Deduction arrears	X			
439.	Taxes (State, Federal, and Local)	X			
440.	Allocation fields (dept, project, location, etc.)	X			
	Non-Wage Income				
441.	Handles earned income credit.	X			
442.	Handles imputed income by pay period.	X			
443.	Handles relocation expenses to reflect as income	X			
	Wage Allocations				
444.	Supports multi-tier wage allocations across multiple cost centers	X			
	<i>System provides wage allocations by:</i>				
445.	Departments	X			
446.	Divisions	X			
447.	Regions	X			
448.	Locations	X			
449.	Branches	X			
450.	Cost centers	X			
451.	Projects	X			
452.	Pay groups	X			

CALCULATING PAY (Cont'd.):

No.	Requirement	R	P	Code	Comments
Terminated Associates					
453.	Automatically stops deductions and calculates final pay based on employee's termination date (including PTO, benefit deductions, etc.).		X		
Reporting					
454.	Provides standard wage allocation reports		X		
<i>Reports can be created with actual cost allocations including:</i>					
455.	Rate of pay	X			
456.	Shift codes – How many are allowed?	X			
457.	Hours	X			
458.	Earnings	X			
459.	Deductions	X			
460.	Deduction arrears	X			
461.	Taxes (State, Federal, and Local)	X			

TAXES:

No.	Requirement	R	P	Code	Comments
462.	Provides for all federal, state and local taxing jurisdictions within the United States and its territories.	X			
463.	Supports tax calculations of lived in versus worked in state and local payroll taxes.	X			
464.	Supports state and local reciprocal agreements.	X			
465.	Provides all relevant quarterly and end-of-year payroll processing reports, including W-2, 941, 1099s, State, SUI, and worksite reporting.	X			
466.	Service includes automatic filing of quarterly and end-of-year reports	X			
467.	Supports the outsourcing of payroll tax deposits and filings.	X			
468.	Supports client with preparing tax deposits and filings internally.	X			
469.	Produces tax documents, magnetic media, and signature ready reports to file.	X			
470.	Vendor can provide a print service for W-2s.	X			
471.	Allows a customer to create/print their own W-2s.	X			
472.	Allows an employee to view/print their own W-2.	X			
473.	Supports federal, state and local supplemental wage taxation.	X			
474.	Allows for earnings to be taxed at different tax rates (e.g., regular and supplemental) on the same check.	X			
475.	Delivers all wage tax categories for wages reported (e.g., W-2, 1099).	X			
476.	Maintains tax rates within the proposed system.	X			
477.	Maintains a history of tax tables by change date.	X			
478.	Employees can change W-4 information via a Web portal.	X			
479.	System administrators can change employee W-4 data via a Web portal.	X			
480.	Tax documents (e.g., signed W-4, I-9) can be attached to an employee's record.	X			
481.	Employees can perform pay check modeling.	X			
482.	Provides a payroll tax reconciliation tool.	X			
483.	Tracks YTD taxes, by tax type for an unlimited number of years in check detail history.	X			
484.	Tracks YTD taxable wages, by tax type, for an unlimited number of years in check detail history.	X			
485.	Accommodates separate tax exempt controls for federal, state, and local taxes.	X			
486.	Provides additional withholding fields for federal, state, and local taxes.	X			
487.	Supports one-time additional tax amounts in payroll processing.	X			

TAXES:

No.	Requirement	R	P	Code	Comments
488.	Allows for payroll adjustments to correct taxes to be posted to current quarter.	X			
489.	Allows for payroll adjustments to correct taxes to be posted to a prior quarter.	X			
490.	Allows for a payroll administration user to generate an employee W-2C.	X			

PAYROLL TIME ENTRY:

No.	Requirement	R	P	Code	Comments
491.	Allows customization of the pay sheet so that only data for a specific payroll appears on the pay sheet.	X			
492.	Specifies the columns the user wants to display on the pay sheet.	X			
493.	Controls the properties of the columns the user specifies.	X			
494.	Designates specific groups of employees to pay.	X			
495.	Views employee and group totals as payroll data is entered.	X			

PAYROLL PROCESSING:

No.	Requirement	R	P	Code	Comments
496.	Run supplemental payrolls at any time.	X			
	Provides for pay data entry by:				
497.	Employee online		X		
498.	Manager online		X		
499.	Batch uploads	X			
500.	Import from integrated time and attendance solution	X			
501.	Exception-based/autopay (e.g., salaried or fixed hourly employees).	X			
502.	Performs gross-to-net calculations per employee per check, which are immediately viewable.	X			
	User can override an employee's pay check by entering or changing:				
503.	Tax Frequency	X			
504.	Method of payment (e.g., check vs. direct deposit)	X			
505.	Rate of pay	X			
506.	Hours	X			
507.	Earnings	X			
508.	Deductions	X			
509.	Deduction arrears	X			
510.	Taxes	X			
511.	Allocation fields (e.g., dept, job, project, location)	X			
512.	Performs gross up calculations.	X			
513.	Allows for an unlimited number of checks issued to an employee per payroll processing.	X			
514.	When preparing multiple checks for an employee during a payroll process, options exists for direct deposit or live check as well as the ability to exclude or process deductions.	X			
515.	Provides pre-check registers and audit reports prior to processing payroll.	X			
516.	Allows for manual checks to be printed onsite or any location.	X			
517.	voids payroll checks by selecting the appropriate check; changes should be applied to applicable quarter's totals.	X			
518.	Provides capability to re-run selected steps of the payroll process.	X			
519.	Provides for check reconciliation.	X			

PAYROLL PROCESSING (Cont'd.):

No.	Requirement	R	P	Code	Comments
	Using Web browser, administrators can run the entire payroll process including:				
520.	Collect employee time	X			
521.	Open payroll	X			
522.	Calculating pay (including gross-to-net)	X			
523.	Pre-check preview and editing	X			
524.	Check payroll processing status	X			
525.	Generating pay checks and/or direct deposit advises	X			
526.	Payroll reporting	X			
527.	GL reporting	X			
528.	Post payroll	X			
529.	Close payroll	X			
530.	Create manual checks (interim, voided)	X			
531.	Print checks from the Web		X		
532.	Update deduction goal amounts	X			
533.	Perform check reconciliation	X			
534.	Tax filing	X			
535.	Supports different types of payment methods (e.g., direct deposit, live check).	X			
536.	Print checks in any order, which may differ from payroll registers.	X			
537.	Proposed vendor can provide check printing services.	X			
538.	Provides internal check printing capability.	X			
539.	Supports laser printed pay statements to include MICR coding and signatures.		X		
540.	Supports unlimited check detail history.	X			
541.	Provides online pay statements to employees without creating paper statements.	X			
542.	Allows for paid time off information (e.g., vacation) to be on pay statement.		X		
543.	Supports paying employees from different bank accounts.	X			
544.	Create an "ACH" file for direct deposit.	X			
545.	Can rerun "ACH" file to include adjustments.	X			
546.	Allows employees to have multiple direct deposit accounts.	X			
547.	Supports partial direct deposits in either a flat dollar amount or a percentage of an employee's pay.	X			
548.	Supports Positive Pay.		X		
549.	Process a refund (negative deduction) with no earnings, pretax and after tax deductions (taxes adjusted with refund).		X		

CHECK MANAGEMENT:

No.	Requirement	R	P	Code	Comments
550.	Allows for Paid Time Off and Accrued Absent Time (AAT) information to be on pay statement.		X		
551.	Creates an ACH file for direct deposit.	X			
552.	Allows customer to rerun ACH file to include adjustments.	X			
	Voided Checks				
553.	Provides ability to void checks by number and reversals are immediately fed to the general ledger.	X			
554.	Provides ability to enter multiple check voids by range.	X			
	Direct Deposits				
555.	Handles direct deposit to multiple financial institutions in various federal reserve districts.	X			
556.	Allows for an unlimited number of checks issued to an employee per payroll processing.	X			
557.	Allows for manual checks to be printed onsite.	X			

LABOR ALLOCATION:

No.	Requirement	R	P	Code	Comments
	System provides for an unlimited number of the following:				
558.	Companies in one database	X			
559.	Departments	X			
560.	Divisions	X			
561.	Locations	X			
562.	Cost centers	X			
563.	Jobs	X			
564.	Supervisors	X			
565.	Pay groups	X			
566.	GL base accounts	X			
567.	Tracks an unlimited number of labor distributions in history.	X			
568.	Allows at least four client definable organizational levels.	X			
569.	Supports a multi-tier labor allocation (e.g., allocation on different fields, dept., job, location).	X			
	Reports can be created with actual cost allocations including:				
570.	Earnings	X			
571.	Employee deductions	X			
572.	Employee taxes	X			
573.	Net pay	X			
574.	Employer deductions	X			
575.	Employer taxes	X			
576.	Workers' compensation premiums	X			
577.	Supports the creation of labor allocation files with user defined timeframes (e.g., 1 payroll period or 7 payroll periods).	X			
578.	Allows actual labor allocations to be fed into General Ledger.	X			
579.	Creates labor allocation reports.	X			
580.	Allows for end of month accrual processing	X			

GENERAL LEDGER:

No.	Requirement	R	P	Code	Comments
581.	Maps GL account numbers within your payroll system.	X			
582.	Accommodates multiple GL segments and can be printed separately or all together on reports.	X			
583.	GL setup tables are assessable by users to change at any time.		X		
584.	GL distribution report or file can be created for a user defined period.	X			
585.	Creates GL entries.	X			
586.	GL account numbers can be changed by the user and the GL can be rerun for specified pay period(s)	X			
587.	Immediate availability of GL data when the payroll is posted to history.	X			
588.	GL historical data is accessible to user.	X			
589.	Adjustments (e.g., manual and void checks) are automatically posted to GL.	X			
590.	GL feature includes tools to export data in a user specified format.	X			
591.	Provides an ad hoc query tool for reporting on GL data.	X			

TIME AND ATTENDANCE:

No.	Requirement	R	P	Code	Comments
592.	Uses an integrated time clock system to capture in and out times	X			
593.	Support various types of time clocks, including biometric clocks	X			
594.	Includes multiple rounding rules by pay group.	X			

TIME AND ATTENDANCE (Cont'd.):

No.	Requirement	R	P	Code	Comments
595.	Multiple grace periods by pay group.	X			
596.	Unlimited number of user defined time/earnings codes	X			
597.	Includes the definition and application of complex pay rules based on timesheet details.	X			
598.	Date effective recording of all timesheet- and employee-related data.	X			
600.	Can maintain and modify any and all complex pay rules without vendor intervention.	X			
601.	Allow employee punch captured for start and stop times of breaks and lunches.	X			
602.	Allow group change capabilities to modify common elements in a group of employee timesheets.	X			
603.	Employees can enter hours using on-line timesheets.	X			
604.	Timesheet values can be adjusted by week and selected days within a week by authorized users.	X			
605.	Provides a comprehensive audit trail of all changes made to the timekeeping records.	X			
606.	Tracks both standard and actual hours by activity code for analysis purposes.	X			
607.	Stores employee hours to be withheld from payroll upload.	X			
608.	Retro calculations based on payroll transfer date.	X			
609.	Allow the viewing of overtime by employee(s) by time period.	X			
610.	Allow validation of over 100,000 docket codes, in an on-line fashion, when activity code is entered at timekeeping device.	X			
611.	Includes various types of payroll lockdown dates to freeze timesheet edits for payroll processing (i.e. supervisor lockout date, hands-off date, etc.).	X			
612.	Allow a fully reconciled payroll, labor and job activity information captured and maintained within the application	X			
613.	Allow the tracking of labor metrics (includes project, job, department and dockets).	X			
614.	Allow the real-time alerting of immediate time and attendance value/ rule violations including; Minor rule violation State rule violation Local rule violation No shows Approaching Overtime	X			
615.	Allow employees to punch in and out and make position changes on-line.	X			
616.	Allow on-line edits to daily timesheets by employee and by authorized users.	X			
617.	Allow real time access to activities and related costing information.	X			
618.	Allow the validation of absence codes against associated leave balances.	X			
619.	Allow for absence tracking with year at a glance scoring and analysis.	X			
620.	Allow for the viewing employee attendance data for a given year.	X			
621.	Allow employees to request time off, tracks status with dynamic validation against time off business rules.	X			
622.	Allow for the employee to view their timesheet along with weekly hours and costs.	X			
623.	Allow for non-technical personnel to generate standard reports via a web-based, wizard-style interface.	X			

TIME AND ATTENDANCE (Cont'd):

No.	Requirement	R	P	Code	Comments
624.	Allow for scheduled reports to run automatically and be distributed to specific users/distribution lists, via email or other means of distribution.	X			
625.	Allow for the building, modification and maintenance of custom reports by non-technical employees.	X			
626.	Allow for the report hours of worked/dollars earned by employee by selected date range.	X			
627.	Allow the reporting of employee leave balances totals.	X			
628.	Allow for reports to be created by copying an existing report and modifying it.	X			
629.	Allow for the routing of exception report results to supervisors.	X			
630.	Allow for business intelligence rules to be built supporting customer specific requests.	X			
631.	Tracks FMLA including intermittent leave.		X		
632.	Report on FMLA status including intermittent leave based on rules established.		X		

HISTORY:

No.	Requirement	R	P	Code	Comments
633.	Provides a narrative history (e.g., for disciplinary actions, grievances, exit interviews).		X		
634.	Provides point-in-time reporting capability.	X			
635.	All historical data is viewable.	X			
636.	All historical data is reportable.	X			
	Maintain unlimited history on the following:				
637.	Job information	X			
638.	Salary and wage data	X			
639.	Career, skills and education	X			
640.	Training information	X			
641.	OSHA and workers' compensation data	X			
642.	Organizational changes	X			
643.	Employee status	X			
644.	Benefit elections	X			
645.	Pay check details	X			
646.	Earnings detail	X			
647.	Deduction detail	X			
648.	Tax detail	X			
649.	Archives older historical records.		X		
650.	Can bring firm history from prior software.	X			

EMPLOYEE SELF SERVICE:

No.	Requirement	R	P	Code	Comments
651.	Employees can view communications posted from administrators.	X			
	Employees can access links that can launch:				
652.	Documents (forms may be saved and/or printed).	X			
653.	Web sites	X			
654.	E-mails	X			
655.	Employees can model their paycheck for changes including deductions, marital status, and exemptions.	X			

EMPLOYEE SELF SERVICE (Cont'd.):

No.	Requirement	R	P	Code	Comments
	Employees can view and/or update personal information including:				
656.	Name	X			
657.	Address	X			
658.	Phone numbers	X			
659.	Emergency contacts	X			
660.	Previous employment	X			
661.	Educational background	X			
662.	Employees can view their status and key dates.	X			
662.	Employees can view company property assigned to them.		X		
	Employees can view job information including:				
664.	Job code and title	X			
665.	Date and time in job		X		
666.	Compensation	X			
667.	Supervisor.	X			
668.	Organizational levels	X			
669.	Unlimited job history including change reasons		X		
670.	Unlimited salary review history	X			
671.	Licenses	X			
672.	Skills	X			
673.	Tests		X		
674.	Awards		X		
	Employees can view unlimited pay history including:				
675.	Net pay	X			
676.	Hours by code	X			
677.	Earnings by code	X			
678.	Deductions by code	X			
679.	Taxes by code	X			
680.	Direct deposit distribution	X			
681.	Employees can view current and previous year-to-date totals.	X			
682.	Employees can view and update their direct deposit distribution and set effective date.	X			
683.	Employees can download and print their W-2.	X			
684.	Employees can designate that the electronic copy of the W-2 is the only copy that they require.		X		
685.	Employees can enter time transactions.	X			
	Employees can view benefit information including:				
686.	Current benefit elections	X			
687.	Employer contributions by code	X			
688.	Beneficiaries and dependents	X			
689.	PTO accruals and balances	X			
690.	Cobra qualifying events	X			
691.	Participate in an electronic open enrollment	X			
692.	View all eligible plans	X			
693.	View the costs associated with these plans	X			
694.	Choose their benefit plan and coverage option	X			
695.	Request time off from their manager	X			
	Employees can update current benefits coverage based on the following life events:				
696.	New hire	X			
697.	Adding a dependent	X			
698.	Removing a dependent	X			
699.	Change in marital status	X			
700.	Change in address/location	X			
701.	Eligibility for other coverage	X			
702.	Loss of other coverage	X			
703.	Employees can view documents attached to their employee record.	X			
704.	Employees can view open jobs.	X			
705.	Employees can apply for open jobs.	X			

MANAGER SELF-SERVICE:

No.	Requirement	R	P	Code	Comments
706.	Managers have access to any employee self-service capability that requires manager's approval of changes				
707.	From a Web browser, managers can search for employees by name or employee number.				
	From a Web browser, managers can view the following information:				
708.	Employee personal information				
709.	Employee job information		X		
710.	Employee job history (specify internal or external?)		X		
711.	Employee compensation history				
712.	Previous employment information				
713.	Educational background				
714.	Licenses, certifications and/or credentials		X		
715.	Review and approve all leave request				
716.	Update organization information (e.g., department, division, supervisor).				
717.	Attach documents to an employee record (such as commendations or certificates?)				
718.	Establish whether attached documents are viewable by the employee				
719.	Access on-line forms/checklist, etc.				

SYSTEM ADMINISTRATION:

No.	Requirement	R	P	Code	Comments
720.	Offers role-based security (system access based on an individual's role within the organization).	X			
721.	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).	X			
722.	Offers the ability to copy roles when creating them.	X			
723.	Includes built-in workflow.	X			
724.	Includes a Web business rules feature that enables administrators to view and edit entries in code and description tables.	X			
725.	Includes a company communications posting feature that enables you to make company information available 24 x 7 to users via the Web.		X		
726.	Includes the ability to upload and securely share documents such as Microsoft Word documents, Excel spreadsheets, and PDF files.		X		
727.	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).	X			
728.	Includes the ability to designate whether page links will appear inside the product framework or be launched in a second browser.	X			
729.	Includes the ability to customize the color scheme for your Web pages.		X		
730.	Includes the ability to re-brand the Web pages (i.e., use your own logo).	X			
731.	Includes the ability to add your own menu items and Web pages, and still be contained within the system's security framework.		X		
732.	Includes the ability to establish user-defined fields on Web pages.	X			

SYSTEM ADMINISTRATION (Cont'd.):

No.	Requirement	R	P	Code	Comments
733.	Offers the choice to display or not display user-defined fields on employee Web pages.	X			
734.	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.	X			
735.	Generates data-driven user names and passwords to increase the options for creating Web user login names and default passwords.	X			
736.	Allows you to view user login activity.	X			
737.	Adds non-employee users (e.g., IT support, auditors) as system users.	X			
738.	Activates new Web users automatically or manually.	X			
739.	Terminates employees' Web access inactivated automatically or manually.	X			
740.	Resets user passwords.	X			
741.	Requires strong passwords (case sensitive).	X			
742.	Requires that passwords expire based upon a number of days designated by the system administrator.	X			
743.	Requires that passwords for a given user are always different by maintaining password history.	X			
744.	Stores and displays password hints to help remind users of their passwords.	X			
745.	Uses a mass password reset to change the default password for one or all users.	X			
746.	Ability to secure at a field level.	X			
747.	Ability to audit who has viewed/changed items in the system.	X			
748.	Can the system establish single log on for all components of system?		X		

WORKFLOW:

No.	Requirement	R	P	Code	Comments
749.	Provides built-in approvals for a hierarchy (multiple levels) of approvers.	X			
750.	Provides for approval by role, where anyone who is assigned the role can approve incoming requests.	X			
751.	Allows the re-allocation or delegation of tasks from one approver to another.	X			
752.	Allows the assignment of observers and e-mail recipients to workflow processes.	X			
753.	Automatically send e-mail notices to approvers to inform them that they have a request that requires attention.	X			
754.	Automatically sends e-mail notices to the initiator of a request to let him/her know it has been approved.	X			
755.	Allows users to view outstanding workflow transactions in various states such as pending or complete	X			
756.	Allow out of the office delegations to automatically manage workflows during an individual's absence	X			
757.	Allow users to cancel pending workflows (e.g., when an employee leaves the company).	X			
758.	Provides wizards to walk managers through work event processes.	X			
759.	Uses audit trails to capture all modifications to employee information.	X			
760.	Captures the date and time when a request was approved.	X			
761.	Captures who approved a request.	X			
762.	Captures approver comments associated with a request.	X			
763.	Performs real-time updates to employee information.	X			

WORKFLOW (Cont'd.):

No.	Requirement	R	P	Code	Comments
764.	Allows users to make date-sensitive changes, which are applied on the desired date.	X			
765.	Allows users to view summary statistics about all workflow activity.	X			
766.	Allows workflow e-mail messages to be customized.	X			
767.	Displays warning and error messages to users in relation to requested changes.	X			

REPORTING:

No.	Requirement	R	P	Code	Comments
768.	Provides standard report capabilities.	X			
769.	Provides ability to schedule standard reports.	X			
770.	Provides access to unlimited years of check and schedule history.	X			
771.	Provides flexibility for defining selection criteria, data ranges, sorting and grouping options, and report output enabling users to tailor information to their specific needs.	X			
772.	Provides ability to set up and run batch reports.	X			
773.	Provides ability to access reports area from within the system.	X			
774.	Provides user-friendly, graphical user interface for accessing and running reports.	X			
775.	Provides point-in-time reporting capabilities.	X			
776.	Provides integrated ad hoc report writer.	X			
777.	Generates reports on all fields that exist in the data dictionary.	X			
778.	Allows for incorporation of graphics such as logos.		X		
779.	Provides easy-to-use report catalog; user is not required to understand the database design.	X			
780.	Presents data in a way that makes it easy for users to navigate within a database and assemble reports.	X			
781.	Provides ability to change field names.		X		
782.	Provides "open" system so that it can be used with other report writer tools.		X		
783.	Provides managers with standard pre-formatted reporting functionality.	X			
784.	Managers can run reports on live data	X			
785.	Managers can select report criteria at run time	X			
786.	Access to reports is based on a manager's role (filtered security setup).	X			
787.	Data on reports is filtered by the manager's security (filtered security setup).	X			
788.	Report results can be stored	X			
789.	Managers can view and reuse a previously stored report	X			
790.	Managers can select a report sort order	X			
791.	Manager can select a report group order	X			
792.	Manager can select report page breaks	X			
793.	Managers can set expiration dates for reports		X		
794.	Managers can output reports in PDF format	X			
795.	Managers can output reports in Excel format	X			
796.	Ad hoc Reporting from a Web browser	X			
797.	Ad hoc reports can be scheduled	X			
798.	Reports can be run while managers are in other parts of the system	X			
799.	Managers can store and access previously run reports	X			
800.	Managers can create custom reports	X			

REPORTING (Cont'd.):

No.	Requirement	R	P	Code	Comments
801.	Does the system have the ability to export reports in a format that may be sent to recipients electronically without manual reformatting?		X		
802.	Can letters be generated as well as mailing labels in multiple formats directly from the system?		X		
803.	Can the system perform calculations within reports such as Turnover and Retention rates for a specific time interval?		X		

LEARNING MANAGEMENT SYSTEM:

**We are not requiring vendors to have a learning management system. Preferred;
If LMS system is selected from the vendor, these functional requirements**

No.	Requirement	R	P	Code	Comments
804.	LMS supports web-based, instructor-led, virtual classroom course delivery methods.	X			
805.	LMS has the ability to blend learning activities; mix a series of components in different delivery formats (pre-test, instructor-led course, on the job assignment) and roll them into a single course.		X		
806.	LMS provides learners the ability to bookmark for self-paced learning.	X			
807.	LMS provides sequencing in blended learning activities, for example, to ensure that a pre-test is taken before the course.	X			
808.	Admin has ability to assign job duty checklists as a learning activity and track completion.	X			
809.	Admin has ability to assign web links with instructions as a learning activity and track completion.	X			
810.	Learners can view calendars showing courses and assignments available each month.	X			
811.	Provide every learner with a personalized dashboard to view all assigned, registered, in progress, recommended, and completed learning at a glance.	X			
812.	Ability for learners to self-register for trainings assigned on dashboard.	X			
813.	Learner can register for a course with a minimum of clicks.	X			
814.	Learners can submit learning requests to admin or managers that are not available in the catalog.		X		
815.	Learner has access to their own training transcripts.	X			
816.	Learners have search capability for training catalog.	X			
817.	Managers can track and approve their team's trainings.	X			
818.	LMS has portals designed for managers.	X			
819.	Managers have the ability to view their team's transcripts, certifications, and training compliance.	X			
820.	Managers can pull reports (excel and pdf format) for training compliance, upcoming trainings, and training registration.	X			
821.	Admin can assign users to a class in bulk or individually.	X			

LEARNING MANAGEMENT SYSTEM (Cont'd.):

No.	Requirement	R	P	Code	Comments
822.	Track instructors identified for specific trainings.	X			
823.	LMS manages certificates for all trainings and they are accessible to learners in excel or pdf with the ability to print from their location.	X			
824.	LMS is web-based and accessible from any internet site.	X			
825.	LMS is mobile ready.		X		
826.	Ability to add, update, reschedule, and remove courses from the course catalog without requiring support from the IT organization.	X			
827.	Admin can create a curriculum or certification program within the course catalog.	X			
828.	Admin manages login, visibility to transcript/certificates, and historical training records for inactive employees.	X			
829.	LMS maintains a waitlist for classroom trainings and allows administrators to manage the classroom trainings.	X			
830.	LMS automatically assigns learning (courses, curricula, or certifications) to individuals or groups or enroll them in courses.	X			
831.	LMS/Administrator assigns due dates for course completion.	X			
832.	LMS sends notifications of upcoming or past due learning dates.	X			
833.	LMS tracks multiple attempts at a learning event.	X			
834.	Admin has the ability to manage the training calendar and learning schedules.	X			
835.	LMS provides guest account access.	X			
836.	LMS provides group notifications to all students enrolled in a course.	X			
837.	LMS tracks on the job training activities.	X			
838.	LMS provides pre-testing capabilities.		X		
839.	LMS provides post-testing capabilities.	X			
840.	LMS gamification of learning.		X		
841.	LMS provides career planning and development capabilities that are integrated with other performance and talent management processes.	X			
842.	LMS interacts with other TM systems to build career ladders and associated skill/competency requirements for each job title.	X			
843.	LMS has capability to create ad hoc reports including the ability to combine information from multiple processes.	X			
844.	LMS supports graphical reports (bar charts and pie charts).	X			

LEARNING MANAGEMENT SYSTEM (Cont'd.):

No.	Requirement	R	P	Code	Comments
845.	LMS must interface with current TM software (Halogen Software)	X			
846.	Keep organization structure and employee list in TM in sync with LMS (updates to personnel information: name, job title, department, location, supervisor)	X			
847.	A page within the LMS for instructors and management to see enrolled users and run reports.	X			
848.	LMS will interface with employee's Outlook Calendar, and automatically updates as training dates change.		X		
849.	LMS will support mobile learning.	X			
850.	Vendor will migrate content & all information in the current LMS to the new LMS.	X			
851.	Vendor will provide training manual on navigating the LMS.	X			
852.	LMS will upload SCORM database online trainings.	X			
853.	LMS will host a catalog of online trainings for behavioral healthcare workers; as well as risk management/compliance trainings by OSHA, HIPAA, etc.		X		
854.	LMS will have a training calendar accessible to all employee's dashboard showing classroom trainings for that month.		X		
855.	Electronic notification for upcoming trainings (24, 48 hour email notification)	X			
856.	Personal page/dashboard for each employee to identify required and elective trainings both online and classroom.	X			
857.	Personal page/dashboard for each employee to maintain transcript of all completed trainings; date completed, score, credits.	X			
858.	Ability for employee to print off certificate of completions for all trainings.	X			
859.	Maintain a catalog of courses and trainings within the LMS available for all participants to see.	X			
860.	Ability for managers to recommend and mandate training required of employees by selection upon sign-on to the LMS.	X			
861.	Ability for employees to view recommended and mandatory courses listed upon sign-in to the LMS, and via email notification.		X		
862.	Ability for employees to register for classes within the LMS and receive an electronic confirmation via email notification.	X			
863.	Ability for employees to receive an electronic confirmation of completion and/or management approval of training via email notification.	X			
864.	Ability for managers to receive notification with an embedded link to LMS to approve employee training upon employee registration.	X			
865.	Ability to record completion of training and update of employee training records with interface between LMS and TM systems.	X			
866.	Ability to alert manager of mandatory training that has not been completed by employee within thirty (30), sixty (60), ninety (90) day alert time frame via email.	X			
867.	Ability to generate reports of completed and non-completed training requirements (by employee, department, and administration) in both Excel and PDF format.	X			

LEARNING MANAGEMENT SYSTEM (Cont'd.):

No.	Requirement	R	P	Code	Comments
868.	Call center or online support for both online and classroom courses, support for both self-paced and instructor led trainings.		X		
869.	LMS has team/group management feature.	X			
870.	Training rosters can be uploaded to excel and printed.	X			
871.	Ability for instructors to view reports showing time, date, location and registration for trainings.	X			
872.	Ability to interface	X			